

**Specifications attached to the
Invitation to Tender**

EASA.2013.OP.21

Outsourcing of certification tasks to
National Aviation Authorities and Qualified
Entities – LIMITED RE-OPENING

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Introduction to EASA

The European Aviation Safety Agency, (hereinafter “EASA”, “the Agency” or “the Contracting Authority”), is an agency of the European Union, which has been given specific regulatory and executive tasks in the field of aviation safety. The Agency constitutes a key part of the European Union’s strategy to establish and maintain a high uniform standard of safety and environmental protection in civil aviation at European level.

The Agency was set up in 2003 as an independent body of the European Union under European public law accountable to the Member States and the European Union institutions. It works hand in hand with the National Aviation Authorities (NAAs) in Europe for the execution of many operational tasks. The aviation industry is also actively involved in the Agency’s activities through a number of consultative and advisory committees. Moreover, EASA develops close relations with counterpart organisations across the world concluding working arrangements aimed at harmonising standards and promoting best practice in aviation safety worldwide.

The main tasks of the Agency currently include:

- Rulemaking: drafting aviation safety legislation and providing technical advice to the European Commission and to the Member States;
- Inspections, training and standardisation programmes to ensure uniform implementation of European aviation safety legislation in all Member States;
- Safety and environmental type-certification of specific models of aircraft, engines and parts approved for operation in the European Union;
- Approval of aircraft design organisations worldwide and of production and maintenance organisations outside the EU;
- Coordination of the European Union programme SAFA (Safety Assessment of Foreign Aircraft) regarding the safety of foreign aircraft using European Union airports;
- Data collection, analysis and research to improve aviation safety.

The Agency’s responsibilities have been extended in the new [EASA Basic Regulation 216/2008](#) so as to include essential rulemaking in the fields of air operations & flight crew licensing and the oversight of third country operators. Further extensions include safety regulations regarding airports and air traffic management systems.

Based in Cologne, the Agency already employs more than 700 professionals from across Europe. It will continue to recruit highly qualified specialists and administrators in the coming years as it consolidates its position as Europe’s centre of excellence in aviation safety.

Further information can be found on the Agency’s web site at <http://easa.europa.eu/home.php>.

1 Overview of this Tender

1.1 Description of the Contract

The services required by EASA under the contract to be potentially awarded as a result of this call for tender are described in the terms of reference in **sections 2, 3, 4 & 5** of the present tender specifications.

1.2 Timetable

Summary timetable	Date	Comments
Launch date	4 th December 2013	
Deadline for addressing requests for clarification to EASA	20 th January 2014, 17:00*	Tenderers are advised to check the EASA Webpage on a regular basis for possible updates and/or clarifications. <i>*Please note that due the Christmas holidays any questions received later than the 19th December 2013 will be answered, as soon as possible, after the 6th January 2014.</i>
Last date on which clarifications are issued by EASA	23 rd January 2014, 14:00*	
Deadline for submission of tenders	27 th January 2014	Tenders delivered by hand shall be submitted not later than 17:00h*
Opening session	3 rd February 2014 ¹	
Completion date for evaluation of tenders	February / March 2014	Estimated
Signature of contracts	March 2014	Estimated

1.3 Participation in the Tender Procedure

This procurement procedure is open to any natural or legal person wishing to bid for the assignment and established in any of the European Union Member States, Norway, Iceland, Liechtenstein or Switzerland as well as from Albania, the Former Yugoslav Republic of Macedonia (FYROM), Montenegro or Serbia – hereinafter referred to as “EASA member states” (including all consortium members and sub-contractors).

In addition, tenderers must not be in any situation of exclusion under the exclusion criteria indicated in section 6.1 of these tender specifications and must fulfil the general selection criteria indicated in section 6.2 as well as the relevant/respective specific selection criteria indicated in sections 6.3, 6.4 & 6.5.

* Cologne local time

¹ Maximum one legal representative per participating tenderer may attend the opening session. Tenderers shall inform the Agency of their intention to attend, at least 5 working days prior to the opening session.

Please note that any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or EASA during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of his tender and may result in administrative penalties.

1.4 Participation of Consortia

Consortia may submit a tender on the condition that it complies with the rules of competition.

A consortium may be a permanent, legally-established grouping or a grouping which has been constituted informally for a specific tender procedure. **In the event of successful award a valid consortium agreement, signed by all consortium members, must be provided to the Agency, before contract signature.**

Such grouping (or consortium) must specify the company or person heading the project (the leader) and must also submit a copy of the document authorising this company or person to submit a tender on behalf of the consortium. All members of a consortium (i.e. the leader and all other members) are jointly and severally liable to the Contracting Authority.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria (see section 6 of these tender specifications). Concerning the selection criteria "economic and financial capacity" as well as "technical and professional capacity", the evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

The participation of an ineligible person will result in the automatic exclusion of that person. In particular, if that ineligible person belongs to a consortium, the whole consortium will be excluded.

1.5 Subcontracting

The tenderer must indicate clearly which parts of the work will be sub-contracted **and** to what extent (proportion in %). The sub-contractor must not sub-contract further.

Sub-contractors must satisfy the requirements under the exclusion criteria applicable to the award of the contract. If the identity of the intended sub-contractor(s) is already known at the time of submitting the tender, all sub-contractors must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria "economic and financial capacity" as well as "technical and professional capacity", the evidence provided by the sub-contractors will be checked to ensure that the requirements are met by the tenderer as a whole.

In addition, a duly signed and dated **declaration of intent** (see **Annex X**) shall be submitted by each sub-contractor, confirming their irrevocable undertaking to collaborate with the tenderer, should he win the contract and that they will put all appropriate and necessary resources from their part at the tenderer's disposal for the performance of the contract.

If the identity of the sub-contractor(s) is not known at the time of submitting the tender, the tenderer who is awarded the contract will have to seek EASA's prior written authorisation before entering into a sub-contract.

Where no sub-contracting is indicated in the tender the work will be assumed to be carried out directly by the bidder.

1.6 Presentation of the Tenders

Tenders must comply with the following conditions:

1.6.1 Tenders must be submitted in accordance with the **double envelope system**:

The **outer envelope** or parcel should be sealed with adhesive tape, signed across the seal and carry the following information:

- the ref. number of the invitation to tender **EASA.2013.OP.21**
- the project title **"Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities – LIMITED RE-OPENING"**
- the name of the Tenderer
- the indication ***"Tender - Not to be opened by the internal mail service"***
- the address for submission of tenders *(as indicated in the letter of invitation to tender)*
- the date of posting *(if applicable)* should be legible on the outer envelope

The outer envelope must contain **three inner envelopes**, namely, **Envelopes A, B and C**.

The content of each of these three envelopes must be as follows:

Envelope 1	Administrative Documents
	<ul style="list-style-type: none">➤ the signed, dated and duly completed Tender Submission Form using one of the templates provided in Annex VII <u>and</u> all the documents / evidences listed therein.
Envelope 2	Technical Proposal
	<p>One signed original of the technical offer and CD/USB stick containing an electronic version of the technical offer (scans of and identical in full to the original offer / documents):</p> <ul style="list-style-type: none">➤ Specific Selection Criteria - Technical and Professional Capacity Documents (relative to the areas for which an offer is made) as requested in section 6.3, 6.4 & 6.5 and using the checklists provided in Annex XIII, XIV & XV respectively:<ul style="list-style-type: none">- Section 6.3 - Product Certification – Annex XIII- Section 6.4 - ECOFA – Annex XIV- Section 6.5 - FSTD – Annex XV➤ IF APPLICABLE²: Technical proposal (see section 7.1 of the tender specifications).
Envelope 3	Financial Proposal
	<ul style="list-style-type: none">➤ IF APPLICABLE²: One signed original and three copies of the financial offer (identical in full to the original) using the template provided in Annex II and including the supporting documentation requested therein.

² Please refer to section 2.3 for further information.

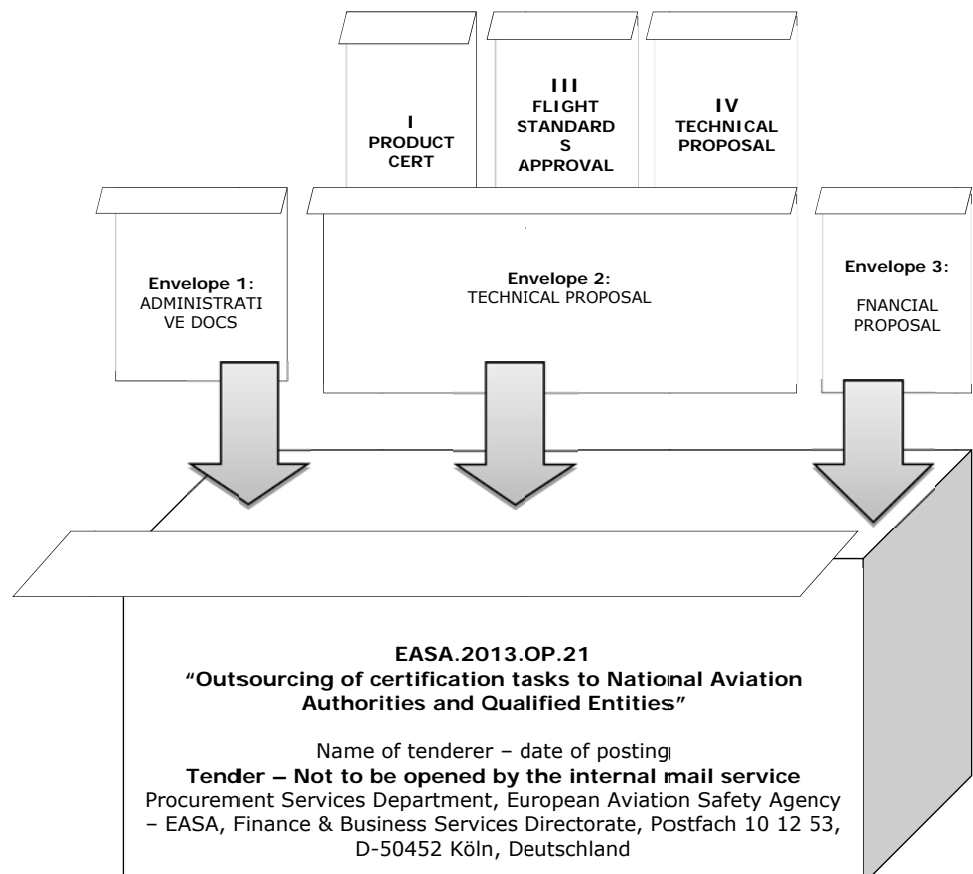
1.6.2 The original tender must be marked "**ORIGINAL**", and the copies (of the signed original) marked "**COPY**".

1.6.3 Tenders should be drafted in one of the official languages of the European Union, **preferably English**.

Should tenderers wish to submit an offer for two or more lots / areas (pursuant to section 2.5) the outer envelope or parcel should contain 3 separate envelopes containing the following:

Envelope 1	Administrative Documents
Envelope 2	Technical Proposal
	<p>➤ Based on the scope of the tender to be submitted, i.e. relative to the areas for which an offer is made envelope 2 should contain (a maximum of) 4 separate envelopes as follows</p> <ul style="list-style-type: none"> I. Product Certification – all technical and professional capacity documents requested in section 6.3. II. Organisation Approval & Surveillance – all technical and professional capacity documents requested in section 6.4. III. Flight Standards Approval – all technical and professional capacity documents requested in section 6.5. IV. Technical Offer (see section 7.1).
Envelope 3	Financial Proposal

For instance, should the tenderer wish to submit an offer for areas in I. Product Certification & III. Flight Standards Approval tenders should be submitted as suggested in the diagram below:



Please Note:

- It is strictly required that tenders be presented in the correct format and include all documents necessary to enable the evaluation committee to assess them. Failure to respect these requirements will constitute a formal error and may result in the rejection of the tender.
- EASA retains ownership of all tenders received under this procedure. Consequently tenderers shall have no right to have their tenders returned to them.
- All costs incurred in preparing and submitting the tenders shall be borne by the tenderers and cannot be reimbursed.

1.7 Period during which Tenders are Binding

The period of validity of tenders, during which tenderers may not modify the terms of their tenders in any respect is 240 days after the deadline for the submission of tenders. In exceptional cases, before the period of validity expires, EASA may ask tenderers to extend the period for a specific number of days, which shall not exceed 60.

The selected tenderer must maintain its tender for a further 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the initial period of 240 days irrespective of the date of notification.

1.8 Contacts between EASA and Tenderers

Contacts between EASA and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

- At the request of the tenderer, EASA may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for clarification must be made in writing by e-mail at outsourcing@easa.europa.eu and should indicate the reference number and the title of the tender.
- Requests for clarification received by EASA after the deadline for such requests for clarification as specified in section 1.2 – Timetable may not be processed.
- EASA may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tenders.
- Any clarifications including that referred to above will be published on EASA's website. **Please ensure that you visit regularly the site for updates.**

After the opening of tenders:

If, after the tenders have been opened, some clarification is required in connection with a tender, or if obvious clerical errors in the submitted tender must be corrected, the EASA may contact the tenderer, although such contact may not lead to any alteration of the terms of the submitted tender.

1.9 Visits to EASA premises

No site visits at EASA's premises are deemed necessary for this procedure.

1.10 Division into lots

The main fields where resources are sought for the purposes of this procurement procedure are described in section 2.2 and further in sections 3, 4 & 5. In addition to these fields, distinction is made between projects/tasks to be **allocated** and the **secondment** of experts.

Consequently, this tender is divided into the following lots:

- **Lot 1: Allocation of tasks (including project management):** Projects/tasks are considered as allocated when the complete project, including the project management is outsourced to an external organisation. The certificate is then issued by EASA based on the technical assessment made by the service provider.
- **Lot 2: Secondment of Experts:** Secondment shall be used in the case that specific expertise is needed in relation to a particular project/task. In this case, the seconded expert reports to and works under the direct technical management of the Agency.

The tenderer may submit a tender for one, several or all of the fields and lots.

1.11 Variants

Your tender should not deviate from the services requested.

1.12 Scope for additional services or for the repetition of similar services

EASA may, at its own discretion, extend the project in duration and/or scope subject to the availability of funding and to satisfactory performance by the contractor.

1.13 Confidentiality & public access to documents

In the general implementation of its activities and for the processing of tendering procedures in particular, EASA observes the following rules:

- Directive 95/46/EC of the European Parliament and of the Council of 24 October 1995 and Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data, and;
- Council Regulation (EC) No 1049/2001 of 30 May 2001 regarding public access to European Parliament, Council and Commission documents.

1.14 Contract Provisions

In drawing up your tender, you should bear in mind the provisions of the draft contract (see **Annex I** to the present tender specifications). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

Nota bene: Submission of a tender implies acceptance of all the terms and conditions set out in the invitation to tender, in the tender specifications and in the draft service contract and, where appropriate, waiver of the tenderer's own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.

In this respect every tenderer is also required to submit a duly filled in and signed **statement of acceptance**, in the form provided in **Annex IX**.

2 Terms of Reference

These terms of reference will become an integral part of the contract that may be awarded as a result of the tender.

2.1 Introduction: Background to the Invitation to Tender

Since 2003 the European Aviation Safety Agency (EASA) has been fully responsible for the certification of products and the approval & oversight of organisations in the field of airworthiness (the so called '**current or existing remits**'). At that time all certification, approval and oversight projects³, as well as the related applications were transferred from the respective National Aviation Authorities (NAAs) to EASA. This created a high workload for which EASA did not yet have the appropriate resources. Therefore, EASA established an outsourcing system that allowed NAAs and their staff to perform certification and approval tasks on behalf of the Agency. This mandate was implemented and enforced by Regulation (EC) No 1592/2002⁴ – **EASA's Basic Regulation (BR)**.

Whilst the Agency signs and retains the overall responsibility for all certificates which the Agency issues, a portion of the technical work on certain projects may be performed by external service providers. The relationship between EASA and these service providers was covered by dedicated framework contracts, which expired in June 2013.

In April 2008, Regulation (EC) No 216/2008⁵, repealing Regulation (EC) No 1592/2002, extended the Agency's scope of competence to include the so called '**new remits**' for the following fields of activities:

- Air operation & flight crew licensing (FCL) - so called 'first extension',
- Air traffic management (ATM) / Air navigation services (ANS) & aerodromes - so called 'second extension'.

These new remits became applicable once the related implementing rules entered into force:

- April 2012 - for the first extension,
- Second half of 2011 - for the second extension.

Although the Agency has significantly increased the number of qualified staff members it employs in these fields of competence, and has consequently internalised a large number of projects and tasks, it shall continue to use the services of external service providers and outsource a part of the certification tasks for current remits and now also for new remits.

Whilst in accordance with EASA Management Board (MB) decision 04/2009 the outsourcing of certification tasks had initially been limited to NAAs, which already had in-house the competent staff and necessary experience, due to their former responsibilities within this field, this scope was by subsequent MB decision 01/2011 extended to include Qualified Entities (QEs), under the condition that they fulfil the requirements listed in Annex V of Regulation (EC) No 216/2008.

³All certification, approval and oversight projects and tasks, for ease of reference and extending to all fields covered by this tender, may across the documents relating to this tender be generically referred to as "certification" and should be understood accordingly – unless specified otherwise or as the context may require.

⁴ Regulation (EC) No 1592/2002 of the European Parliament and of the Council of 15 July 2002 on common rules in the field of civil aviation and establishing a European Aviation Safety Agency (OJ L 240, 07/09/2002, p. 1).

⁵ Regulation (EC) No 216/2008 of the European Parliament and of the Council of 20 February 2008 on common rules in the field of civil aviation and establishing a European Aviation Safety Agency, and repealing Council Directive 91/670/EEC, Regulation (EC) No 1592/2002 and Directive 2004/36/EC (OJ L 79, 19/03/2008, p. 1).

Therefore, in support of the above-mentioned activities the Agency launched in 2011 a restricted tender procedure EASA.2011.RP.06 "Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities" as result of which contracts with several certification service providers (CSPs) were signed and replaced the previous framework contracts which, as mentioned above, expired in June 2013.

The present **new** open tender procedure is being launched with the aim to complement the current framework contracts in order to ensure a sufficient pool of external expertise in certain areas, address new areas for which external support is required and to reflect the change of some of the applicable requirements linked with certain activities which only became known / entered into force after the launch of the previous tender procedure (EASA.2011.RP.06).

2.2 Description of the Subject and Scope of the Contract

The Agency's needs, in terms of qualified resources for the performance of certification activities, encompass a large range of competencies. For the limited purposes of this procurement procedure the fields where resources are sought are as follows:

I. Product Certification:

- Lot 2: Flight Test Activities
- Lot 1: CS-25 & CS-29: minor changes / repairs
- Lot 1: Rotorcraft (CS-CLR, CS-27 & CS-29): CSV and CAW

II. Organisations Approval & Surveillance:

- Lot 1 & 2: Export Certificate of Airworthiness – ECoFA

III. Flight Standards Approval:

- Lot 1 & 2: FSTD – Flight Simulator Training Device tasks

Please note that all categories of aircraft, except those listed in Annex II of Regulation (EC) No 216/2008 are included in the scope of competence of the Agency.

All tasks that may be outsourced as a result of this procedure, as well as the corresponding categories of aircraft concerned, are described in more detail in the dedicated paragraphs below (**sections 3, 4 & 5**).

2.3 Procedural Process

This tender procedure is launched as a follow-up to EASA tender procedure EASA.2011.RP.06 "Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities" of 2011 (as mentioned in section 2.1 above) to complement those contracts which were concluded as a result of this procedure. These contracts are currently in effect and are valid until 7th April 2017.

The present tender does not re-open all of the areas covered by the previous tender, but rather addresses those areas where a potential external expertise shortage was identified, new areas need to be included and / or where new requirements have come into force.

Taking into account the unique nature of this tender, the following distinction between tenderers shall be made for reasons of efficiency and equal treatment:

1. **Existing Certification Service Providers (CSPs) / Contractors**

Administrative & Technical Proposal

For efficiency reasons, existing CSPs who have valid contracts signed with EASA as a result of the above-mentioned previous tender procedure (EASA.2011.RP.06), and who wish to submit a proposal for areas covered by the present tender procedure, **will not be required to re-submit** the documents requested under:

- **Section 6.1 Exclusion Criteria & Section 6.2 General Selection Criteria** since, although the tenderers should still meet these criteria, this is already controlled and maintained as a part of the accreditation process - see section 2.4 for further details, and,
- **Section 7.1 Technical Proposal & Evaluation**, in which unless the existing contractor wishes to submit an updated / amended technical proposal the technical score achieved under the previous tender procedure shall be applied.

Only the documents requested under **Sections 6.3, 6.4 & 6.5 – Specific Selection Criteria** - depending on the areas for which an offer is made – need to be submitted.

Financial Proposal

To ensure equal grounds of competition with new tenderers without negatively affecting the outcome of the previous tender, existing CSPs⁶ will be allowed to modify their financial offer only and exclusively if such modification should result in a reduction of the price(s), in which case they shall submit a new financial offer in accordance with section 7.3 Financial Evaluation & 7.4 Financial Proposal and using the financial offer model provided in Annex II. In the case no improved financial offer is submitted the prices included in the existing contracts (and evaluated under the previous tender) shall be applied.

Contract

On conclusion of the tender procedure, and in case of successful award, the Agency intends to amend the respective existing framework contract and include those areas which have been successfully awarded under this new tender procedure.

2. **New Tenderers**

Administrative & Technical Proposal

New tenderers are required to submit all evidence, in full, as per the requirements in Section 6 Exclusion & Selection Criteria and Section 7 Award Criteria.

Financial Proposal

New tenderers shall fill in and submit a financial offer as per the financial offer model provided in Annex II and evaluated in line with Section 7 of the present tender specifications.

Contract

On conclusion of the tender procedure the Agency intends to sign multiple framework contract(s) with the successful tenderer(s), i.e. tenderers whose offers shall reach the required minimum threshold(s) set in the tender documentation (see draft contract model in Annex I).

⁶ Please note that all existing CSPs will be contacted and given the opportunity to amend their financial offer (as described above, i.e. downwards) even if they do not wish to submit an offer for the areas covered by this tender.

Tender Submission Form

To aid the preparation and submission of tenders two forms of the tender submission form / checklist (Annex VII) have been provided - one for **existing contractors (Annex VII.1)** and one for **new tenderers (Annex VII.2)**.

2.4 Accreditation

In accordance with the provisions defined in EASA Management Board (MB) Decision 01/2011 adopting the guidelines for the allocation of certification tasks **accreditation (ACCR) shall be a prerequisite** for the outsourcing of certification tasks to service providers.

In practice this means that on conclusion of the procurement procedure those contracts signed with successful tenderers shall only be valid (i.e. to the effect that tasks may be outsourced under such contracts) **subject to accreditation being obtained and maintained throughout the duration of the contract** and covering the scope of the contract awarded.

The main **objective of the accreditation** is to ensure that these service providers have the necessary capabilities, management systems and expertise (as well as the required independence / impartiality / absence of conflict of interest etc.) to execute the allocated tasks **in accordance with the applicable EASA procedures** and to verify the information/documents provided during the procurement procedure.

Within the **Agency a system and process for accreditation** has been established covering in particular:

- Initial accreditation;
- Continued oversight and surveillance;
- Changes to the scope of accreditation;
- Amendment of scope;
- Suspension, withdrawal and revocation of accreditation, in whole or in part and
- Dispute resolution mechanisms.

The accreditation will be conducted in accordance with EASA processes and based upon the applicable EASA Management Board (MB) Decision. A full **overview of the accreditation procedure** shall be made available to the tenderers upon request.

Please note that all communication between the service provider and EASA during the execution of the accreditation audit shall be conducted in the English language.

Please note: Should service providers make use of facilities located outside EASA member states which subsequently would also need to be audited during the accreditation then all costs incurred, during such accreditation audit for these facilities, shall be borne by the service provider.

A full overview of the **accreditation process** is therefore hereby included in **Annex XVI** to the present tender specifications.

2.5 Application & Award Process

Tenderers are requested to submit an offer for **one or more of the areas** shown in the '**Tender Submission Form**' (Annex VII). All areas under which an offer is submitted shall be clearly indicated using this form.

As described above, on conclusion of the procedure, the Agency intends to sign contracts or contract amendments with successful tenderers and only those areas, which are successfully awarded to the respective tenderer shall be included in the resulting framework contract. Therefore, after contract signature, and subject to

accreditation (see section 2.4 above), **projects/tasks may only be assigned to such tenderer/contractor within those respective areas.**

All personnel presented and **approved** (through successful award - i.e. *inter alia* fulfilling the technical & professional capacity criteria – see **section 6**) under this procedure shall be annexed to the concluding framework contract. Nevertheless, should further expertise become available to any specific contractor, after contract signature, **within the areas awarded** to such contractor, these additional PCMs/Experts may subsequently also be presented and, subject to verification of the same requirements, approved and annexed to the contract.

2.5.1 Description & Duration of the Contract

A framework contract is a legal agreement between two parties, in this case, EASA and the service provider. It acts as the basis for possible future purchases of services by the Agency. The framework contract contains, *inter alia*, a description of the scope of services that can be purchased by EASA, methodology, timing and fees to be respected by the contractor.

The Agency intends to **sign multiple framework contracts or contract amendments (see section 2.3 above) with the successful tenderers, valid until 7th April 2017.**

2.5.2 Implementation of the Contract

The contract shall be implemented through the issuance of requests for services, by means of **purchase orders**, as described in Article I.4 - IMPLEMENTATION OF THE CONTRACT of the draft framework contract (**Annex I** to these specifications).

Please note that the framework contract itself is not an order for services; no legal or financial commitment, on behalf of either party, shall exist without the issuance of a **valid purchase order**.

2.5.3 Allocation Process

After contract signature the selection of a service provider to undertake a particular project or task will be conducted in accordance with following **allocation criteria** which will be applied to each particular project/task to be assigned:

1. Accreditation– *is the service provider accredited for the scope of the task (see section 2.4)*
2. Experience
3. Competence & Expertise
4. Proximity
5. Compliance with the Agency's strategic goals for outsourcing
6. Costs & Efficiency
7. Availability

Please note that the Agency reserves the right to amend/revise these criteria, as necessary, in light of experience gained and for safety related reasons throughout the duration of the contract.

The criteria above provide a high level overview of the allocation process. A full description/overview of the allocation process is therefore hereby included in **Annex XVII** to the present tender specifications.

2.5.4 Payment Formalities

The necessary invoicing and payment formalities to be observed are described in and shall be conducted with strict adherence to the draft framework contract (**Annex I** to these specifications). In particular, please pay attention to Articles II.4 – INVOICING AND

2.6 Management System

The tenderer shall have an established management system including, without limitation, the following elements:

- a. **Documented policies and procedures:** The tenderer shall have policies/procedures/manuals describing its organisation and thereby providing both the means and methods to ensure the consistent and continuous fulfilment of tasks.
- b. **Document control:** The tenderer shall have adequate document controls in place ensuring in particular the availability, regular updating and distribution of reference documents to serve as the basic working documents throughout the organisation.
- c. **Staffing policy:** The tenderer shall have a suitable staffing policy ensuring the control of the adequacy of resources, qualifications, knowledge, skills, experience, initial training, recurrent training and performance evaluation.

Please note in particular that the contractor shall, throughout the duration of the resulting contract, ensure:

- **Personnel:** in line with Article II.1.5 of the draft contract (**Annex I** to these specifications) that all personnel (and its providers' personnel) performing the services have the adequate experience & technical competency required for the execution of the tasks assigned to them.
 - **Maintenance & Development of Technical Expertise:** that all personnel are kept up to date of any developments and/or changes on relevant regulation, procedure, technology etc. Furthermore, the contractor shall ensure the continuous professional development of all personnel so that they have the opportunity to maintain and expand their areas of competence, experience & expertise held.
 - **No conflict of interest:** that all personnel working on EASA projects are in no situation of conflict of interest whatsoever, able to work free from any hierarchical or economic pressure and/or incentive which could affect their judgement or the results of a technical investigation, are committed to carrying out their duties with the greatest possible professional integrity and will observe the highest level of professional secrecy with regard to all information acquired in the process of carrying out their tasks.
- d. **Compliance monitoring:** the tenderer shall have a suitable system in place in order to monitor the compliance of the management system with all applicable regulations and the adequacy of all procedures with performance objectives. Compliance monitoring shall include a feedback system of audit findings to the senior management to ensure corrective action is taken as necessary.
- Please note in particular the following:
- **New/Revised Regulations:** the contractor shall ensure, on entry into force of any new/revised regulations and their implementing rules that all relevant policies are applied and adhered to. These new regulations/requirements shall also, on entry into force, become a part of the scope of accreditation.
- e. **Quality & Internal Audit:** the contractor shall put in place a person or group of persons, ultimately responsible to senior management to monitor compliance of the management system with the relevant requirements and adequacy of the procedures.

- f. **Facilities:** the tenderer shall have adequate facilities and office accommodation for the performance of the contract (particularly for communication and archiving).
- g. **Archiving & Data Protection:** the contractor shall have an established records management & archiving policy that allows adequate traceability and data protection of records/data relating to the tasks executed during the performance of the contract. Moreover, the contractor shall possess secure archiving facilities and observe all conditions set out by the Agency, in articles I.13 and I.14 of the draft framework contract (**Annex I** to these specifications).

Please note in particular the following:

- **Project Documentation/Records:** All project documentation/records related to any work undertaken on behalf of the EASA shall, upon request, be made available promptly to the Agency.

The management system procedures of the contractor shall provide the possibility and mechanism to be adjusted in case new requirements regarding the processes will be set by the Agency. Additionally no feature of the contractor's organisation or provision of the contractor's procedures should prevent the execution of tasks and provision of records as required by EASA procedures.

Please bear in mind that these documents – and management systems generally - shall be reviewed during the accreditation process and therefore if necessary English versions of some/all documents may be requested in which case the service provider shall be obliged to provide a suitable and good quality translation.

2.6.1 Changes to the management system

- The contractor shall be able to update its management system relating to any change to the relevant regulations and/or applicable procedures in a timely manner to ensure effective & efficient implementation.
- The contractor shall notify the Agency of any significant changes to the management system in a timely manner.
- Please note that the Agency reserves the right to request clarification with regard any changes made to the management system.

2.7 Quality & Continuity Assurance

The contractor shall ensure that a high level of service and reliability is maintained at all times and that the quality and consistency of the services delivered is sustained throughout the duration of the contract.

2.8 Languages

Unless specified otherwise by the Agency, English shall be the main working language of the contract including all correspondence with EASA, relevant documents/reports, ad-hoc forms etc. Therefore, all proposed personnel should have an excellent level of English, in particular in technical/aviation and business English.

Should proposed personnel be able to perform services in any languages other than English EASA would welcome information in this respect.

2.9 Management Reporting

The service provider shall provide management reports as described in and in accordance with Article I.16 of the draft framework contract (**Annex I** to these specifications).

2.10 Procedures

All work performed shall be conducted, at all times in strict compliance with EASA procedures & policies as in force and updated from time to time. Therefore, please note that such documents/procedures are subject to development and improvement and therefore any additional or revised documents/procedures required for the implementation of the contract shall be provided in due course and/or alternative means of access to documents provided.

In order to prepare the tender, in addition to those procedures which are already available on the EASA Webpage, all applicable procedures which have been identified as being necessary to submit a tender for this procedure have been prepared in CD format.

Nota Bene: Since many of these documents are reserved for EASA internal use only and/or may contain confidential/sensitive information tenderers are reminded that all procedures/documents/work instructions etc. provided to them as a part of and after conclusion of this tender are the property of the Agency and the contents therein should not be communicated to third parties or other persons not connected to the procedure or, in the case of successful award, the contract.

2.10.1 Important for NEW Tenderers: Request for CD of Procedures

With respect to the above, in order to receive the CD of procedures, tenderers are required to submit a duly filled in and signed '**Request for Procedures CD - Declaration of Confidentiality**' using the form provided in **Annex XII**.

Tenderers who would like to receive such a CD should **inform EASA as soon as possible by sending an email to outsourcing@easa.europa.eu indicating the scope of the tender** (i.e. the areas for which an offer will be made – flight test, ECOFA etc.) so as to prepare the CD accordingly whilst waiting for the signed declaration.

On receipt of the signed declaration the Agency shall immediately send you the CD of procedures per registered mail – therefore please ensure that an accurate and valid postal address is given at the time of request.

3 Product Certification

3.1 Outline of the services required

In support of the Agency's product certification activities EASA is looking to sign contracts with qualified, experienced and competent contractor(s) who shall perform the following functions:

3.1.1 Lot 1: Allocation of tasks including project management

The contractor shall conduct, on behalf or under the management (supervision) of the Agency the following technical investigations/tasks, including project management and provide the required technical statements and closure documents in the field of product certification:

- Minor changes/repair
- Certification support for validation (CSV)
- Continuing airworthiness (CAW)

The kinds of technical investigations/tasks which shall be required (i.e. that the Agency may outsource) have been defined per product as shown below:

			TASK		
			Minor Changes / Repairs	CSV	CAW
PRODUCT	Fixed Wing Aircraft	CS-25	<input type="checkbox"/>		
	Rotorcraft	CS-VLR		<input type="checkbox"/>	<input type="checkbox"/>
		CS-27		<input type="checkbox"/>	<input type="checkbox"/>
		CS-29	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In addition, project certification managers (PCMs) and experts may be requested to provide support to design organisation approval (DOA) teams by performing the following tasks:

- Participation in the preparation of DOA investigation or surveillance activities;
- Participation in DOA investigation or surveillance activities;
- Assessment of the competencies of applicants personnel (including interviews);
- Support follow-up and closure of findings.

3.1.1.1 Application & Award Process

The tenderer is requested to submit an offer for **one or more of the areas** shown in the above grid (as indicated with a ☐) by presenting at least one PCM/Expert (fulfilling the requirements defined in section 6.3 – specific selection criteria – technical & professional capacity– for the respective area(s)). The areas for which an offer is submitted shall be clearly indicated using the 'tender submission form' annexed to these specifications (Annex VII).

On conclusion of the procurement procedure, contracts or contract amendments (see section 2.3 for further information) shall be signed with successful tenderers and only those areas, which are successfully awarded to the respective tenderer, shall be included in the concluding framework contract or contract amendment and therefore **projects may only be assigned to such tenderer within those respective areas**. In this respect such scope shall be fixed for the duration of the contract and subject to accreditation (see section 2.4).

All personnel presented and **approved** under this procedure (through successful contract award) shall be annexed to the concluding framework contract. Nevertheless, should further expertise become available to any specific contractor, after contract signature, **within the areas awarded** to such specific contractor, these additional PCMs/Experts may subsequently also be presented and, subject to the same requirements (as listed in section 6.3), approved and annexed to the contract.

3.1.1.2 The Certification Team

Each certification task to be outsourced shall be assessed and assigned by the Agency.

Depending on the type and complexity of the project, the selected contractor shall propose, for the approval of the EASA certification manager (CM), a suitable team (PCM and any additional team members (TMs)), divided by the relevant activity panels, in order to effectively perform the certification task.

In the context of product certification, the basic responsibilities/limitations of the roles which could be assigned to the certification team are defined as follows:

Project Certification Managers (PCMs)

PCMs shall be expected to manage and perform the core technical and administrative processes of certification projects for aeronautical products in order to ensure compliance with applicable safety standards and where relevant, in coordination with a team of experts. The PCM shall also sign the technical statement and project closure document (technical visa (TV)).

The PCM should:

- Assume full responsibility for assigned projects and work autonomously of EASA with regard to certification including continuing airworthiness (CAW) processes.
- Act as focal point, when required/requested, for all matters related to a specific company/applicant.
- Consistently recognise and escalate to the Agency, any problems or issues as and when they arise which could have systematic repercussions for product safety and/or other functions in EASA.

Junior PCMs:

- Involvement should (unless –exceptionally– authorised by EASA) be restricted to less complex certification activities in line with experience already obtained and under the management, supervision and responsibility of the PCM.
- For the performance of functions in areas outside those where comprehensive experience has already been gained all appropriate technical support and development plans should be ensured.
- Should not take any decisions that set precedent or policy.

Experts

Experts shall, within their scope of expertise, ensure product safety by providing essential and accurate expertise in order to influence and permit decisions in certification including continued airworthiness. In particular, the contractor shall ensure that the relevant expert(s) are assigned to all projects, and especially for any products using new technology.

3.1.1.3 Experts & Expertise

All experts presented under lot 1 who are subsequently approved and accepted by the Agency through successful contract award (i.e. fulfilling the requirements in section 6.3) shall automatically be valid and approved for secondment (i.e. under lot 2), unless otherwise expressly stated by the tenderer in the offer. In other words, all

experts approved to work on allocated projects can also be used by the Agency for secondment (unless specified differently by the contractor).

Within each of the above areas, aside from the PCM role, the following disciplines have been defined:

1	Flight Test
2	Structure
3	Hydro-mechanical Systems
4	Software & Complex Electronic Hardware (CEH)
5	Transmission
6	Avionics Systems
7	Electrical Systems
8	Human Factors
9	Cabin Safety
10	ECS & Ice Protection
11	Noise
12	Powerplant / Fuel Installations

Information with respect to the expertise available under the various disciplines shall be presented as part of the offer using the template provided in **Annex XIII_ii. Personnel** and shall be used at the stage of allocation (i.e. after contract signature and accreditation).

For each discipline (field of expertise) specific competencies/domains have been defined; the experts proposed should, within their field of expertise, be competent in **at least 1 of the domains identified**:

DISCIPLINE (Fields of Expertise)		DOMAINS					
1	Flight Test	CS23 General Aviation	CS25 Large Aircraft	CS27 Small Rotorcraft	CS29 Large Rotorcraft		
2	Structure	Aeroelastics	Loads	Static strength analysis and test	Fatigue and Damage Tolerance	Dynamic analysis and testing related to crashworthiness, bird strike etc.	Materials and processes
3	Hydro-mechanical Systems	Landing gear Systems	Doors Systems	Flight control Systems	Flap and Slat Systems	Hydraulics systems	
4	Software & CEH	Software	Airborne Electronic Hardware (AEH)	Development Assurance & Safety Assessment			
5	Transmission	Reliability	Static strength analysis	Fatigue and Damage Tolerance	Lubrication	Vibration Health Monitoring	Qualification Testing
6	Avionic Systems	Autoflight and Autothrust Systems	Indicating and Recording Systems	Communication Navigation Surveillance (CNS)/Air Traffic Management (ATM) Systems	Airborne Security		
7	Electrical Systems	Electrical Systems Generation and distribution	Electrical Wiring Interconnection System (EWIS)	HIRF and Lightning (Direct and Indirect Effects)	Lighting System		

8	Human Factors	Human Machine Interface and Cognitive ergonomics	Physical ergonomics				
9	Cabin Safety	Fire safety (Materials, systems)	Crashworthiness (occupant protection)	Security	Emergency Equipment (Oxygen, fire-extinguisher, etc.)	Evacuation (Demo/Analysis, ditching, exit access)	Cabin Configurations (Airlines, Cargo, VIP)
10	ECS & Ice Protection	Air conditioning and pressurisation	Flight in Icing	Oxygen	Bleed Air Systems	Water & Waste	
11	Noise	Related activities to noise testing and data evaluation					
12	Powerplant/ Fuel Installations	Power plant installation	APU installation	Fire Protection in Unpressurized Area	Fuel System		

Information in this respect about each of the experts proposed shall be presented as part of the offer using the CV template provided for in **Annex XIII_iii. PRODUCT CERT – CV**.

To this end the contractor shall ensure, **at the time of allocation**, that all proposed experts have **at least 5 years' experience in the relevant discipline**.

The experts shall, in general and without limitation, be expected to perform the following tasks:

- I. Establish the certification basis for designs by providing technical expertise and advice.
 - Inputs: the assigned project and all supporting documentation including, where necessary, a familiarisation/kick-off meeting.
 - Outputs: Preliminary concurrence to the certification basis.
- II. Identify the need for and participate in establishing special conditions and/or guidance material for aspects of the design not addressed by existing requirements or guidance material in the field of expertise.
 - Inputs: design description, design novelties and unsafe conditions related to service experience.
 - Outputs: draft certification review items (CRI) (including special conditions, advisory material, equivalent safety findings, guidance material).
- III. Ensure that the applicant's proposed certification programme addresses the applicable requirements and guidance material.
 - Inputs: general CRI establishing the certification basis.
 - Outputs: approval of the certification programme in the field of expertise.
- IV. Decide on the acceptability of the demonstration of compliance and level of involvement.
 - Inputs: appropriate technical presentation to the expert to ensure a good level of understanding of the product, review the certification plan and the means of compliance (MoC) proposed.
 - Outputs: formal acceptance of the certification programme and the associated MoC, issue of certification action item for level of involvement.
- V. Ensure that the proposed product design complies with the applicable requirements and guidance material.
 - Inputs: review of the certification documents supported by tests witness or audits. With regard to certification flight crew they must first fly the aircraft as defined in the corresponding advisory circular (AC) or acceptable means of compliance (AMC).

- Outputs: acceptance of the certification documents.
- VI. Permit the issue of the certificate by providing an expert statement of satisfaction.
 - Inputs: completeness of compliance demonstration with the agreed certification basis.
 - Outputs: statement of satisfaction from the expert of the field of competence.
- VII. Provide advice in the field of expertise to EASA team member involved in the certification activity.
 - Inputs: request from EASA.
 - Outputs: advice.

3.1.2 Lot 2: Secondment of experts

Lot 2 (secondment of experts) for product certification activities is **only formally re-opened in the field / discipline of flight test** for which the requirements listed in **section 6.3.C** (specific selection criteria – technical / professional capacity) shall apply.

Therefore should you wish to apply for the field / discipline of flight test (lot 2) please ensure that this is clearly indicated using the 'tender submission form' annexed to these specifications (Annex VII).

Please note however that as mentioned above, all experts presented under lot 1 which are subsequently approved and accepted by the Agency through successful contract award shall automatically be valid for and approved for secondment (i.e. under lot 2), unless otherwise expressly stated by tenderer in the offer. In other words, all experts approved to work on allocated projects can also be used by the Agency for secondment (unless specified differently by the contractor).

3.2 Working Methods & Coordination (Lot 1 & 2)

All work performed shall be conducted at all times in strict compliance with EASA procedures and policies –as in force at the time of allocation. For certain projects a project information document (PID) shall be prepared, through which any additional specific details and/or working methods to be observed shall be communicated.

3.2.1 Meetings & Trainings

In addition to any meetings and/or conferences required as part of an assigned project/task the following meetings/trainings have been defined and shall be attended by PCMs/Experts at the expense of the contractor i.e. all related costs such as daily allowances, travel and/or accommodation costs etc. shall be covered by the contractor.

Please note that participation to such a training/induction, even if requested/required from the Agency, shall not serve as a guarantee in respect of receiving subsequent projects/tasks. The allocation of projects/tasks shall be carried out in line with the allocation process as described in section 2.5.3.

3.2.1.1 Introductory Training

PCMs and/or experts, who have never worked directly with EASA on certification tasks/projects, shall be requested to attend a compulsory (maximum) 2 day training/induction at EASA's premise in Cologne, Germany (before commencement of work on any particular project).

3.2.1.2 PCMs: Section Coordination Meetings

Whenever deemed necessary and upon invitation by the Agency PCMs shall be expected to attend a maximum of two 'Section Coordination Meetings' per year at EASA's premise in Cologne, Germany.

3.2.1.3 Experts: Workshops

Whenever deemed necessary and upon invitation by the Agency experts shall be expected to attend a maximum of two 'Workshops' per year, normally within their field of expertise, at EASA's premise in Cologne, Germany.

3.2.2 Communication & Additional reporting

All PCMs/experts shall establish and maintain communication and exchange of technical information during the project on a regular basis to ensure a homogeneous interpretation of requirements, keep abreast of any new developments or relevant information and in order to ensure the proper and successful development/completion of the project. In addition to the management reporting defined in the draft contract (Annex I) further reporting may be requested by EASA and defined during the project implementation, such as for example monthly reports, intermediate status reports, additional supporting technical documentation etc.

3.2.3 Project Documentation

Please note that all project documentation related to any work undertaken on behalf of the EASA shall be made promptly available to EASA on request.

3.2.4 Professional Development

In general it is important to note that, in line with Article II.1.5 of the draft contract (Annex I to these specifications), the contractor shall ensure, throughout the duration of the contract, that its staff (and its providers' staff) performing the services have and maintain the experience and technical competency required for the execution of the tasks assigned to them.

4 Organisations Approval & Surveillance

4.1 Lot 1 & Lot 2 Export Certificate of Airworthiness for newly manufactured aircraft (ECOFA)

BACKGROUND

The organisation approval activities consist of approving organisations responsible for production, maintenance, maintenance training and continued airworthiness management located outside the territory of the Member States, and design organisations wherever located. Other activities also consist in approving production organisations located in the territory of one or more Member States, if requested by the Member State(s) concerned, and ensuring the continuous compliance of approved organisations by performing appropriate oversight.

ISSUE OF EXPORT CERTIFICATES OF AIRWORTHINESS FOR NEWLY MANUFACTURED AIRCRAFT

Production Organisation Approvals (POAs) are managed by EASA in accordance with Part 21 Subpart G of Regulation (EC) 748/2012⁷. The main task of the EASA Production Organisation Approvals section is the approval of production organisations located outside the territory of the Member States, as well as production organisations located within the territory of the Member States if requested by the Member States, to ensure compliance of approved production organisations with applicable safety standards by performing continuous oversight.

Within this framework the Agency is also responsible for the issue of Export Certificates of Airworthiness for newly manufactured aircraft by EASA approved production organisation, when EASA is acting as a Competent Authority of a State of manufacture.

APPLICATION & AWARD

In support of the Agency's ECOFA activities EASA is looking to sign contracts with qualified and experienced contractor(s) who shall conduct, on behalf of (lot 1 - allocation) or under the guidance of (lot 2 - secondment) the Agency, tasks in the field of ECOFA.

The tenderer is requested to submit an offer by presenting at least **two experts** (fulfilling the respective requirements defined in **section 6.4** – specific selection criteria - technical & professional capacity).

Please note, that at the stage of allocation, EASA shall determine the requirements regarding the size of the team / number of experts necessary to handle each particular task, depending on its scope and completion deadline (and therefore may request a team of more/less experts or secondment of more experts than defined above). The Agency shall allocate any particular task to a contractor having enough capacity to handle it and in line with the allocation process as described in section 2.5.3.

REQUIRED SERVICES

Any successful tenderer shall be expected to perform in general and without limitation the following tasks, as may be assigned to him in relation to ECOFA activities of EASA approved production organisations, in accordance with Part 21 and related EASA procedures, which shall include:

ECOFA Allocation of tasks/secondment of experts:

- Evaluate the documentation provided by the POA holder and/or EASA.
- Verify consistency between the application documents.

⁷Commission Regulation (EC) No 748/2012 of 3 August 2012 laying down implementing rules for the airworthiness and environmental certification of aircraft and related products, parts and appliances, as well as for the certification of design and production organisations

- Report timely to EASA at prescribed deadlines.
- Coordinate if necessary with Product Certification Managers.
- Transfer the treated dossier to EASA as described in EASA procedures.
- Provide EASA with all required records/documents in accordance with EASA procedures.
- Answer to applications for ECOFA on a timely manner defined in ECOFA procedures (*note: for certain tasks 24 (hours) / 7 (days) availability is required*).
- Manage resources used, to fulfil EASA contractual obligations.
- Be able to answer to other type of services as requested under bilateral agreements or working arrangements (e.g. issue Certificate of Airworthiness on behalf of the FAA).
- Ensure archiving of all required records/documents in accordance with EASA procedures.

Inputs:

- EASA Form 29 provided by the POA holder and/or EASA.
- EASA Form 52.
- Any other documents required by EASA ECOFA procedures.

Outputs:

- EASA Form 29 with ECOFA inspector's visa.
- Draft EASA Form 27.
- US COFA if applicable.
- Any other records/documents required by EASA ECOFA procedures.

5 Flight Standards Approval

5.1 Lot 1: Allocation of Tasks - Evaluation of Flight Simulation Training Devices (FSTD) and Compliance Monitoring System (CMS) audits

5.1.1 Outline of the services required

Description of the tasks:

FSTDs have to be initially evaluated to achieve a specific qualification level. To keep this qualification level, an FSTD shall be re-evaluated on an annual basis with exemptions based on specific conditions.

The FSTD evaluation activity consists of:

- Evaluation of the Qualification Test Guide (QTG).
- FSTD objective testing.
- FSTD functional and subjective testing.
- Provision on an Evaluation Report.
- Follow-up of corrective actions.
- In addition to FSTD qualifications, the FSTD Operator's Compliance Monitoring System (CMS) has to be audited on a regular basis.

The CMS audit activity consists of:

- Audit of the CMS on a regular basis.
- Provision of an audit report.
- Follow-up of corrective actions.

Depending on the type and complexity of the evaluation, the selected contractor shall propose, for the approval of the EASA FSTD section, a suitable team in order to effectively perform the evaluation task.

For FSTD qualifications, the team shall consist of:

- One Flight Inspector (FI) and
- One Technical Inspector (TI).

For CMS audits, the team shall generally consist of:

- For initial and recurrent audits: a team of two qualified auditors (according to ISO or equivalent) with relevant knowledge, background and experience as appropriate to the activities being audited.
- Follow-up audits are performed by one auditor.

Team members shall, in general and without limitation, be expected to perform the following tasks:

1. Work in accordance with applicable regulations, EASA procedures and any other applicable reference material.
2. Be available to travel extensively as part of any evaluation.

The evaluation of the different categories of FSTD devices is to be conducted by a Technical Inspector and a Flight Inspector having the following qualifications:

- The Technical FSTD Inspector, qualified in all aspects of flight simulation hardware, software and modelling or with equivalent qualifications; and
- The Flight Inspector, qualified in flight crew training procedures and holding:
 - a valid type rating on the aeroplane/helicopter, or,
 - for flight navigation procedures trainer (FNPT) and basic instrument training device (BITD), class rated on the class of aeroplane/type of helicopter being simulated, or,
 - a flight inspector who is qualified in flight crew training procedures, assisted by a type rating instructor holding a valid type rating on the aeroplane/helicopter (or for

- FNPT and BITD), class rated on the class of aeroplane/type of helicopter being simulated, or exceptionally,
 - a person designated who is qualified in flight crew training procedures and holds:
 - a valid type rating on the aeroplane/helicopter, or,
 - for flight navigation procedures trainer (FNPT) and basic instrument training device (BITD), class rated on the class of aeroplane/type of helicopter being simulated and sufficiently experienced to assist the technical team. This person should comply with at least part of the functions and subjective test profiles.
- The audit of the CMS requires inspectors trained in audit techniques.

It shall be the tenderer's responsibility to coordinate with the FSTD operator (the applicant) to ensure availability of other necessary resources to complete the task, such as type (or class) rated instructor for the simulated aircraft, FSTD engineering support staff and specialised equipment (if needed).

Task Input:

- Operator's application form.
- Previous Evaluation Report.
- Dossier in acc. to GM3 ORA.FSTD.100 to be provided by the operator.
- For CMS audits: previous audit report, CMS documentation to be provided by the operator.

Task Output:

- Current Evaluation Report.
- Assessment of corrective actions follow-up reports.
- For CMS audits: audit report, assessment of corrective actions.

FSTD qualification references:

An outline of the applicable evaluation procedures and FSTD requirements are provided in the:

- Authority Requirements (Part-ARA).
- Organisation Requirements (Part-ORA).
- Certification Specifications (CS-FSTD(A)/(H)).
- EASA procedures for FSTD evaluations and CMS audits.

Resources:

Technical equipment (on prior request) and sufficient FSTD and CMS support staff to assist the evaluation or audit shall be provided by the FSTD operator.

Obligations:

The Agency shall supply the defined task inputs (except CMS documentation and dossier) and the contractor shall complete the FSTD evaluation or CMS audit and provide the defined task outputs.

5.1.2 Application & Award Process

In support of the Agency's FSTD qualification activities and associated CMS audits EASA is looking to sign contracts or contract amendments (see section 2.3) with qualified and experienced contractor(s) who shall conduct, on behalf (lot 1) or under the management

(supervision) of the Agency (lot 2 – see section 5.2 below) evaluation and audit tasks (including, as the case may be, project management) in the field of FSTD and CMS.

The tenderer is requested to submit an offer for this **area** by:

- (i) presenting at least two experts (one Technical Inspector (TI) and one Flight Inspector (FI)) fulfilling the requirements defined in **section 6.5 – specific selection criteria - technical & professional capacity**, and,
- (ii) clearly indicating it using the '**tender submission form**' annexed to these specifications (**Annex VII**).

Please note that all experts presented under this lot 1 who are subsequently approved and accepted by the Agency through successful contract award (i.e. fulfilling the requirements in **section 6.5**), shall automatically be approved under lot 2 – secondment, as well, unless otherwise expressly stated by the tenderer in the offer, or for specific tasks within SET activities.

Please note, that at the stage of allocation, the requirements regarding the size of the team necessary to handle each particular task, shall be determined depending on the task scope and completion deadline (and therefore team of more/less experts than defined above may be requested). The Agency shall allocate any particular task to contractors having enough capacity to handle it and in line with the allocation process described in section 2.5.3.

5.2 Lot 2: Secondment of Experts – OSD / FSTD

5.2.1 Outline of the services required

Background

EASA's basic act, Regulation (EC) No 216/2008 stipulates, under Article 5 "Airworthiness" in paragraph 5(e), that the minimum syllabus of maintenance certifying staff type rating training, master minimum equipment list, and associated simulator for pilot type rating training shall be addressed.

In accordance with the above requirement, EASA's proposed amendment to Regulation 748/2012⁸ (Part-21) stipulates that:

The application for a type-certificate or restricted type-certificate for an aircraft shall include, or be supplemented after the initial application, operational suitability data, consisting of, as applicable:

1. The minimum syllabus of pilot type rating training, including determination of type rating and the definition of scope of the aircraft validation source data to support the objective qualification of associated simulators, or provisional data to support their interim qualification.
2. The minimum syllabus of maintenance certifying staff type rating training including determination of type rating.
3. Determination of type or variant for cabin crew and type specific data for cabin crew training.
4. The master minimum equipment list.

The applicant shall specify the type(s) of operation(s) that is (are) covered by his application.

Furthermore, the Agency shall issue certification specifications for associated operational suitability elements.

Within this regulatory framework, and in response to each pertinent application, the EASA Certification Experts' Department will create an Operational Evaluation Board (OEB)

⁸ Commission Regulation (EC) No 1702/2003 of 24 September 2003 *OJ L 243, 27.9.2003, p. 6–79*

dedicated to the relevant Operational Suitability Data (OSD) components. This process shall consist of a series of evaluation steps comprising several meetings with the applicant, a detailed evaluation of the associated OSD, and the issuance of a report regarding the proposal in support of the EASA approval of the proposed elements, as well as the details of any other elements evaluated in response to the application.

In addition to the mandatory elements listed above, the Type Certificate holder (TCH) may request further operational evaluations to help ensure a smooth entry into service. Such evaluations may include (without being limited to) evaluations of equipment installed that will require operational approval at national level.

The Agency will perform those activities using working methods adapted to OSD deliverables. Forms and documents will be made available on EASA's website: <http://easa.europa.eu/certification/flight-standards/fs-overview.php>.

The OEB/OSD experts (and/or, for EASA Simulator Evaluation Team (SET) only, chairpersons) shall be expected to perform, in general and without limitation, the following tasks:

1. Be a member of the evaluation team and ensure adequate coordination with the other evaluation team members.
2. Coordinate with Foreign Aviation Authorities involved in any evaluation in case of joint evaluation.
3. Take into account cultural aspects, TCH structures, specific organisation and different understanding from other authorities.
4. Support the EASA OEB/OSD section/project/programme manager in any matters related to the associated evaluation, including the provision of reports.
5. Work in compliance with applicable regulations, EASA procedures and any other applicable reference material - as in force and updated from time to time.
6. Be available to travel extensively as part of any evaluation.
7. (EASA Simulator Evaluation Team (SET) chair only) Report to the EASA Certification Experts' Manager assigned to the evaluation.
8. (EASA SET chair only) Make a written report to the EASA Certification Experts' FSTD Section Manager after each SET meeting or activity to include an action plan and updates thereto, with copies to the FSTD operator, the aircraft manufacturer, the launching simulator manufacturer and the Certification PCM of the product.

5.2.2 Application & Award Process

In support of the Agency's OSD / FSTD activities the EASA is looking to sign contracts or contract amendments (see section 2.3) with qualified, experienced and competent contractor(s) who shall make experts available to participate in the following areas:

- Lot 2 SET/OSD – Secondment of experts,
- Lot 2 Flight Simulation Training Device FSTD – Secondment of experts, and,
- Lot 2 FSTD operator CMS audits – Secondment of experts

The tenderer is requested to submit an offer by presenting at least one expert (fulfilling the requirements defined in **section 6.5 – specific selection criteria - technical & professional capacity**).

The areas under which an application is to be submitted shall be clearly indicated using the '**tender submission form**' annexed to these specifications (**Annex VII**).

Please note, that at the stage of allocation, EASA shall determine the requirements regarding the number of experts necessary to handle each particular task, depending on its scope and completion deadline (and therefore may request secondment of more experts than defined above). The Agency shall allocate any particular task to contractors having enough capacity to handle it and in line with the allocation process described in section 2.5.3.

5.3 Working Methods & Communication

Notes: Trainings and Meetings

1/ For expert(s) not previously seconded by EASA for this activity and before the beginning of any new activity the expert shall be expected to attend a mandatory initial training at EASA's premises in Cologne held by the Certification Experts' Department supported by the relevant product PCM in order to be briefed on the internal EASA procedures and work instructions to be followed, use of the approved forms, templates and other document management systems in place.

2/ An annual OEB/OSD meeting is organised at EASA's premises in Cologne with all the experts involved in OEB/OSD activities for 1-2 days to:

- harmonise policies,
- review and update applicable procedures,
- exchange experiences,
- receive information and training regarding new procedures, changes, etc.,
- obtain feedback from OEB members,
- obtain feedback from industry.

Travel to the above-mentioned meetings and trainings, accommodation and any other related costs shall be at the sole expense of the Contractor and shall be included in the price presented in the financial offer (see section 7 and using the template provided in Annex II). EASA and / or the applicant shall not be charged for any costs, for the seconded experts or otherwise, related to these meetings.

Please note that participation to such trainings/meetings, even if requested from the Agency, shall not serve as a guarantee in respect of receiving subsequent projects. Allocation of projects shall be carried out in line with the allocation process as described in **section 2.5.3**.

3/ Practical arrangements:

Evaluations shall be generally conducted at a location selected by the applicant and involve travel and mission durations ranging from several days to several weeks. Some meetings may be held at the EASA premises in Cologne.

4/ In addition to the management reporting defined in the draft contract (**Annex I** to these specifications) further reporting may be requested by the EASA and defined during the project implementation, such as for example intermediate status reports, additional supporting technical documentation, monthly progress reporting. Progress reports may have to contain:

- activities provided during the past period;
- potential obstacles/risks to be tackled (if any);
- proposed solution how to tackle those obstacles/risks;
- planned activities foreseen until the next progress report.

Progress reports as well as all documents, used and/or prepared in connection with the performed activities shall be in English, unless otherwise specified by EASA for the project and confirmed by the contractor.

Please note that all project documentation related to any work undertaken on behalf of the EASA shall be promptly made available to EASA upon request.

6 Exclusion and Selection Criteria

6.1 Exclusion Criteria

Participation in this tender is only open to tenderers who are not in any of the situations listed below:

- a) bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;
- c) have been guilty of grave professional misconduct proven by any means which the Contracting Authority can justify;
- d) have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Contracting Authority or those of the country where the contract is to be performed;
- e) have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the European Union's financial interests;
- f) following another procurement procedure or grant award procedure financed by the European Union budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the Contracting Authority as a condition of participation in the contract procedure or fail to supply this information.

Means of proof required (*Only required from new tenderers – see section 2.3 for further information*)

Tenderers shall provide a declaration on their honour (see model in **Annex IV**), duly signed and dated, stating that they are not in any of the situations referred to above.

In addition, tenderers shall provide the following **documentary proofs** to confirm the declaration referred to above:

- For points a), b) and e) a **recent extract from** the judicial record or, failing that, an equivalent document **recently issued by** a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.
- For point d) a **recent certificate issued by** the competent authority of the State concerned.

Where the document or certificate referred to above is **not issued** in the country concerned, it **may be replaced by** a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

6.2 General Selection Criteria

Tenderers shall comply with all the requirements of the **General Selection Criteria** and the **Specific Selection Criteria** set for the areas in which they wish to apply:

- **Section 6.3 – Product Certification**
- **Section 6.4 – Organisation Approval & Surveillance**
- **Section 6.5 – Flight Standards Approval**

In line with section 2.3 *Procedural Process* the selection criteria evidence to be submitted is as follows:

1. **Existing CSPs:** Specific Selection Criteria
2. **New Tenderers:** General Selection Criteria and Specific Selection Criteria

GENERAL SELECTION CRITERIA		
6.2.1	Legal Capacity	
	REQUIREMENT	EVIDENCE
	Tenderers, (including all consortium members and any proposed sub-contractors), are asked to prove that they are authorised to perform the contract under the national law as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register.	<p>Tenderers, (including all consortium members and any proposed sub-contractors), shall provide a duly filled in and signed Legal Entity Form (see Annex V) accompanied by the documents requested therein.</p> <p>(Where a tenderer –other than an existing CSP– has already signed another contract with EASA, he may provide instead of the legal entity file and its supporting documents a copy of the legal entity file provided on that occasion, unless a change in his legal status occurred in the meantime or the legal entity file or its supporting documents are older than one year).</p>
6.2.2	Economic & Financial Capacity	
	REQUIREMENT	EVIDENCE
	The tenderer must be in a stable financial position and have the economic and financial capacity to perform the contract.	<p>Proof of economic and financial capacity shall be furnished by the following documents:</p> <ul style="list-style-type: none"> - balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established); - a duly dated and signed statement of overall turnover during the last three financial years; - if, for some exceptional reason which EASA considers justified, the tenderer is unable to provide the references requested by the Contracting Authority, he may prove his economic and financial capacity by any other means which EASA considers appropriate.

6.2.3	General - Technical and Professional Capacity	
	REQUIREMENT	EVIDENCE <i>(The following documents and information must be presented as evidence of compliance with the technical and professional requirements)</i>
A	REQUIREMENTS REGARDING THE TENDERER'S ORGANISATION	
A	a.	Structure of the Organisation
		<p>The structure of the tenderer's organisation must be suitable in order to ensure the fulfilment of all tasks that may be allocated, in the case of successful award and accreditation, under the concluding framework service contract.</p> <p>To that end the tenderer shall have an appropriate administrative office with clear hierarchical and functional links, so that proper interfacing (in English language) with EASA's Application & Procurement Services Department are possible on all administrative and management aspects of any project (to be) outsourced.</p> <p>Therefore the tenderer shall have established (in-house), as a minimum, the following core functions which are to be independently implemented and managed by different staff members with the appropriate competencies:</p> <ul style="list-style-type: none"> - Core Business: technical services and expertise – at least 2 technical staff/experts; - Management: at least 1 manager capable of reviewing/approving the work of the technical staff/experts; - Administrative: finance, accounting and administration- at least 1 administrative staff member; - Quality & Internal Audit: at least 1 staff member ultimately responsible to senior management for monitoring the compliance of the management system (as described in the tender specifications) with the relevant requirements and adequacy of the procedures.
		<p>The tenderer shall provide information about their organisational structure, detailing as a minimum:</p> <ul style="list-style-type: none"> ➤ Description of the organisation, including organisational chart ➤ Description of hierarchical and functional links, including key management personnel, lines of managerial authority, the responsibilities therein, etc. ➤ Description and details of the employment status of administrative and technical staff within the organisation i.e. volume of directly employed staff, number/details of permanent, part-time, freelance staff etc. ➤ List of headquarters and branch offices ➤ Consortia members (if any) and description of their involvement ➤ Detailed information with regard to all subcontractors (if any) including: <ul style="list-style-type: none"> - Description of their involvement, which parts of the work shall be sub-contracted and to what extent - A duly signed and dated declaration of intent (see Annex X), by each sub-contractor, confirming their irrevocable undertaking to collaborate with the tenderer, should he win the contract and that they will put all appropriate and necessary resources from their part at the tenderer's disposal for the performance of the contract - Please note that all sub-contractors must provide the required evidence for the exclusion and selection criteria as described in section 1.5 to these specifications.
A	b.	Management System
		<p>The Tenderer shall have an established management system as described in section 2.6 in the tender specifications and shall have manuals/procedures describing and encompassing these elements.</p> <ul style="list-style-type: none"> ➤ The tenderer shall provide a list of ALL relevant procedures/manuals relating to the management system for example, but not limited to, document control, staffing policy, record keeping, compliance monitoring & their amendments; and,

			<p>➤ If applicable, the tenderer should also indicate whether or not they have been approved under any international recognised management system standard.</p> <p>Please note: during the technical evaluation (section 7.1) those tenderers successfully passing the selection criteria are requested to substantiate this list by providing some of the procedures/manuals indicated in the above-mentioned list. In addition, and in line with the accreditation process, all applicable documents should be made available on request and prior to or as part of the accreditation audit.</p>
B	RESOURCES		
B	a.	Technical Equipment and Facilities	
		<p>The tenderer must possess the means required to perform adequately the technical and administrative tasks linked with the certification process and must also have access to any equipment needed.</p> <p>➤ Adequate facilities and office accommodations to perform the regular certification work and all administrative activities.</p> <p>➤ Secure archiving facilities in accordance with the provisions of article I.14 of the draft contract (Annex I to these specifications).</p> <p>➤ Equipment, technical and technological resources - the tenderer should be able to demonstrate the existence of and its ability to maintain to an adequate level, at least the following resources:</p> <ul style="list-style-type: none"> ➤ IT hardware, software and systems management; ➤ Adequate data protection and security measures in order to ensure the protection of confidential, personal and/or sensitive material; ➤ Capacity to handle and process all necessary administrative and technical transactions as well as any planned, forecasted or impending significant changes or increases to the business size or capacity; ➤ Records maintenance systems. 	<ul style="list-style-type: none"> • List and description of available facilities, office accommodations, archiving facilities, equipment tools, software, etc. beneficial/essential to the execution of the tasks, and in support of the above declaration, and, • Declaration of Compliance according to Annex XI.
B	b.	Staff Resources	
		<p>The tenderer shall ensure that any of its staff (and its providers' staff) involved in tasks assigned by the Agency have:</p> <p>3. Sound technical and vocational training as well as the necessary technical competence, knowledge and</p>	<p>➤ Duly filled in, signed and dated declaration of compliance as found in Annex XI.</p>

		<p>adequate experience (of the certification tasks and processes) required for the execution of the tasks assigned to them.</p> <p>4. The ability required to draw up in English the declarations, records and reports to demonstrate that the investigations have been carried out.</p> <p>The tenderer must have sufficient capacity to ensure high availability and mobility of the staff involved in performance of the contract and shall grant high priority to any mission(s) necessary for the execution and fulfilment of tasks under the contract.</p>	
B	c.	Absence of Conflict of Interest	
		<p>The tenderer (including all consortium members and all proposed subcontractors) and their staff (including management) shall not be in any situation which could give rise to a conflict of interest in what concerns the implementation of the contract and in line with the provisions of item 1 of Annex V of Regulation (EC) No. 216/2008.</p> <p>In particular (and without limitation) they may not become involved, directly or indirectly, in the design, manufacture, marketing or maintenance of products, parts, appliances, constituents or systems or in their operations, service provision or use.</p>	<p>➤ Duly filled in, signed and dated statements of absence of conflict of interest as found in Annex VIII.</p> <p><i>Please note: In the case of consortia and/or sub-contractors a statement should be completed and furnished by all consortium members and sub-contractors.</i></p>
B	d.	Professional Integrity, Impartiality & Professional Secrecy	
		<p>The tenderer (including all consortium members and all proposed subcontractors) shall ensure that they and their staff:</p> <p>➤ Carry out their duties with the greatest possible professional integrity and with the greatest possible technical competence and must be free of any pressure and incentive, in particular of a financial type, which could affect their judgment or the results of their investigations, in particular from persons or groups of persons affected by the results of the certification tasks.</p> <p>The tenderer must ensure:</p> <ul style="list-style-type: none"> ○ The impartiality of the investigation staff involved in the implementation of the contract and that its remuneration shall not depend on the number of investigations carried out or on the results of such investigations. ○ That their staff shall observe strict professional secrecy with regard to all 	<p>(1) Duly filled in, signed and dated declaration of compliance as found in Annex XI.</p>

		information acquired in carrying out tasks defined under Regulation (EC) No. 216/2008.	
B	e.	Liability Insurance	
		<p>The tenderer shall have adequate liability insurance to cover the scope of the tasks for which an application is to be made:</p> <ol style="list-style-type: none"> 1. General Third Party Legal Liability Insurance: Coverage up to a minimum of <u>5Mio EUR</u> (per claim) 2. Professional Legal Liability Insurance: Coverage up to a minimum of <u>1Mio EUR</u> (per claim). 	<ol style="list-style-type: none"> i. The tenderer shall provide a statement / declaration pledging that the required level of general third party legal liability insurance and professional legal liability insurance coverage shall be taken out, in the case of successful award, to cover the scope of the contract. ii. If the tenderer's liability is assumed by one Member state in accordance with its national law, the tenderer shall provide a duly, signed and dated statement/declaration to this effect. <p>Important: <i>The Agency reserves the right to verify any insurance documents provided and level of coverage undertaken before and during the accreditation stage (see section 2.4) to determine whether or not the level of liability insurance is indeed adequate for the scope of the contract.</i></p>

6.3 Specific Selection Criteria – Product Certification

PRODUCT CERTIFICATION - SPECIFIC SELECTION CRITERIA																							
Technical & Professional Capacity																							
	REQUIREMENTS	EVIDENCE REQUIRED																					
A	Lot 1: Allocation of tasks including project management																						
A	a. Competence & Experience of the Tenderer																						
	<p>The tenderer shall:</p> <ul style="list-style-type: none">➤ Have adequate experience and proven competence performing products certification activities in the relevant areas.➤ Have obtained a minimum number of years' experience in the area of certification as indicated in table below: <table><tr><td></td><td>Minor Changes / Repairs</td><td>CSV</td><td>CAW</td></tr><tr><td>CS-25</td><td>9</td><td></td><td></td></tr><tr><td>CS-VLR</td><td></td><td>6</td><td>6</td></tr><tr><td>CS-27</td><td></td><td>9</td><td>9</td></tr><tr><td>CS-29</td><td>9</td><td>12</td><td>12</td></tr></table> <ul style="list-style-type: none">➤ Flight Test: For those tenderers providing expertise within the discipline of flight test all the organisational requirements listed in specific selection criteria 6.3.C.a below shall also apply.		Minor Changes / Repairs	CSV	CAW	CS-25	9			CS-VLR		6	6	CS-27		9	9	CS-29	9	12	12	<p>By completing the template provided in - Annex XIII_i. Competence & Experience of the Tenderer - the tenderer shall, <u>for each of the relevant areas</u> for which an offer is submitted:</p> <ul style="list-style-type: none">i. Indicate the number of years' it has been performing certification activities.ii. Indicate the number of projects handled (open & completed) during the last 2 years*.iii. Provide details of at least 2 of the previous projects indicated above*. <p>*Important: for those tenderers who have provided certification services to the Agency during the last 2 years and where at least 2 previous projects have been allocated, within each of the relevant areas for which an offer is submitted, only the information requested in point i. above needs to be provided.</p>	
	Minor Changes / Repairs	CSV	CAW																				
CS-25	9																						
CS-VLR		6	6																				
CS-27		9	9																				
CS-29	9	12	12																				
A	b. Personnel																						
	<ul style="list-style-type: none">➤ For each area, for which the tenderer wishes to apply, at least one PCM/Expert (fulfilling the requirements listed in c.) must be made available.➤ For products certification activities the tenderer must, as a minimum, have one in-house (i.e. employed directly by the tenderer) PCM with sufficient experience & knowledge to cover the scope of all activities for which an application is being made. <p>Please note: the same staff member may be used/presented for several areas.</p>	<p>By completing the templates provided in - Annex XIII_ii. Personnel - the tenderer shall, <u>for each of the relevant areas</u> for which an offer is submitted, indicate:</p> <ul style="list-style-type: none">i. The number of personnel it shall make available (i.e. PCM/discipline) per product (Table 1).ii. Details of the personnel it shall make available i.e. overview of submitted personnel (Table 2).																					
A	c. Experience, Qualifications & Competencies of Personnel																						

The tenderer shall ensure that all proposed personnel:

PCMs & Experts

- **Background & Understanding:** Have the adequate technical background and a proven general understanding of the product.
- **English Language:** Have high level of proficiency in English spoken & written English in particular in technical & business English.
- **Aviation Experience:** Have obtained a minimum number of years aviation work experience as indicated in the table below:

	Minor Changes / Repairs	CSV	CAW
CS-25	9		
CS-VLR		6	6
CS-27		9	9
CS-29	9	12	12

Please note that experts in the discipline of **SW&CEH (software & complex electronic hardware) require only 2 years of aviation experience (regardless of product type).*

- **Certification Experience:** Have obtained a minimum number of years professional work experience in the field of certification as indicated in the table below:

	Minor Changes / Repairs	CSV	CAW
CS-25	3		
CS-VLR		2	2
CS-27		3	3
CS-29	3	4	4

- **Experts – experience in the discipline:** the contractor shall ensure that all proposed experts have, **at the time of allocation, at least 5 years' experience in the relevant discipline.**
i.e. in order for an expert to be eligible to work on an EASA project in relation to a particular discipline they must have at the time the project is assigned at least 5 years' experience in that field.
- **Flight Test Crew:** for experts provided within the discipline of flight test (discipline

- i. The tenderer shall present all personnel it shall make available for the performance of the contract by completing the **CV (curriculum vitae) template provided for in Annex XIII_iii. PRODUCT CERT - CV** indicating clearly:
 - All relevant experience, academic and/or professional qualifications & competencies including details of participation in any relevant/major projects and the level of involvement.
 - **For Experts:** by completing the table on the last page of the CV template experts shall provide the number of years' experience gained within each discipline (field of expertise) and an indication of the specific competencies/domains covered.

	<p>1) – the requirements listed in specific selection criteria 6.3.C.c. below shall apply.</p> <p><u>Junior PCMs</u></p> <ul style="list-style-type: none"> ➤ Background & Understanding: Have the adequate technical background and a proven general understanding of the product. ➤ English Language: Have high level of proficiency in English spoken & written English in particular in technical & business English. 	
B	Lot 2: Secondment of experts	
	<p>Lot 2 (secondment of experts) for product certification activities is only formally re-opened in the field / discipline of flight test for which the requirements listed in section 6.3.C below shall apply. However, please note that all experts presented under lot 1 which are subsequently approved and accepted by the Agency through successful contract award shall automatically be valid and approved for secondment (i.e. under lot 2), unless otherwise expressly stated by tenderer in the offer. In other words, all experts approved to work on allocated projects can also be used by the Agency for secondment (unless specified differently by the contractor).</p>	
C	Flight Test	
C	a. Competence & Experience of the Tenderer (FLIGHT TEST)	
	<p>For the provision of services within the discipline of flight test <u>the tenderer</u> shall:</p> <ul style="list-style-type: none"> i. Have flight test management experience including flight test crew management experience. ii. Have a flight test operational manual (FTOM) which shall, as a minimum, contain: <ul style="list-style-type: none"> - A description of the tenderer's processes for flight test. - Procedures for the crew, including composition, competency, currency, flight and duty time in accordance with the applicable flight test regulation (national regulations until PART 21 and PART FCL apply). - A policy for risk and safety management. - A list of documents that need to be produced for flight test. - Operational procedures. iii. Supervision of staff: <ul style="list-style-type: none"> - The tenderer shall have a sufficient number of supervisors in place in relation to the structure of their organisation and the number of flight test crew and certification staff employed. - The duties and responsibilities of these 	<ul style="list-style-type: none"> i. The tenderer shall indicate the flight test activities which have been performed during the last five years. ii. The tenderer shall provide a copy of the flight test operational manual. iii. Description of the management structure/organisation, responsibilities, experiences, methods used for the management and supervision of the following areas: <ul style="list-style-type: none"> (1) Certification flight operations; (2) Flight test crew training; (3) Flight test crew monitoring.

	<p>supervisors shall be defined, and any other necessary arrangements shall be made to ensure that they can discharge their supervisory responsibilities.</p> <ul style="list-style-type: none"> - Personnel responsible for the supervision of crew members and other certification staff must have adequate experience and skills to ensure the attainment & fulfilment of the standards specified in the flight test operations manual (FTOM). <p>*Important - Resources & Training: The contractor shall ensure that all personnel assigned to, or involved in, certification flight operations shall be properly trained and have all the resources needed in order to perform the tasks.</p> <p>The tenderer must ensure that the nominated Flight Test Pilots and Flight Test Engineers meet the currency requirements defined in the EASA Air Crew regulations (Part FCL) or, pending their entry into force, applicable national regulations.</p> <p>The tenderer must provide their flight test crew with all the flight test equipment and emergency training necessary to fly on an aircraft under permit to fly.</p> <p>The tenderer should ensure that all personal involved in flight testing has and maintain throughout the duration of the contract, a medical certificate or equivalent when applicable.</p> <p><i>Please note: the tenderer shall ensure that on entry into force of the new Appendix XII of the Part 21 and of the Part FCL regulation all relevant rules and policies are implemented and adhered to.</i></p>	
C	b. Personnel (FLIGHT TEST)	
	<p>➤ At least one flight test pilot/flight test engineer (fulfilling the requirements listed in c. below) must be made available.</p>	<p>By completing the template provided in - Annex XIII_iv. Flight Test Personnel - the tenderer shall indicate details of the personnel it shall make available i.e. overview of the submitted flight test crew.</p>
C	c. Experience, Qualifications & Competencies of Experts (FLIGHT TEST)	
	<p>1. CATEGORY 1: When selected to perform flight tests on:</p> <ol style="list-style-type: none"> (1) helicopters certified or to be certified in accordance with the standards of CS-27 or CS-29 or equivalent airworthiness codes; or (2) aeroplanes certified or to be certified in accordance with: <ol style="list-style-type: none"> i. the standards of CS-25 or equivalent airworthiness codes; or ii. the standards of CS-23 or equivalent airworthiness codes, except for aeroplanes with a maximum take-off mass of less than 	<p>The tenderer shall present all flight test crew it shall make available by completing the applicable CV template, depending on the category of aircraft type as defined under requirements (left-hand column), provided for in:</p> <ol style="list-style-type: none"> 1. Annex XIII_v. FLIGHT TEST – CAT 1 – CV indicating clearly: <ul style="list-style-type: none"> - All relevant experience, academic and/or professional qualifications & competencies. - Details of all relevant flight experience, flight and flight test hours.

	<p>2000kg;</p> <p>the tenderer shall ensure that all proposed flight test crew meet the requirements defined in <u>paragraphs 1.a and 1.b below.</u></p> <p>2. <u>CATEGORY 2:</u></p> <p>When selected to perform flight tests on aeroplanes with a maximum take-off mass of less than 2000kg (light airplanes, sailplanes, airships or balloons) - the tenderer shall ensure that all proposed flight test crew meet the requirements defined in <u>paragraphs 2.a and 2.b below.</u></p>	<ul style="list-style-type: none"> - Proof (i.e. copy of certificate, diploma etc.) that flight test pilot course, as described in 'initial qualification', has been completed. - Flight test pilot: Copy of valid CPL IR <u>or equivalent</u>. - Any other relevant information / documentation. <p>or</p> <p>2. Annex XIII_vi. FLIGHT TEST – CAT 2 – CV indicating clearly:</p> <ul style="list-style-type: none"> - All relevant experience, academic and/or professional qualifications & competencies. - Details of all relevant flight experience. - Flight test pilot: Proof that appropriate pilot licence, ratings and permissions are held. - Statement of Competence: signed by current manager. - Any other relevant information / documentation.
	<p>1. <u>CATEGORY 1 – REQUIREMENTS:</u></p> <p>1.a. <u>Flight Test Pilot (FTP)</u></p> <p>i. <u>Initial qualification</u></p> <p>FTP must have (for the relevant category of aircraft):</p> <ul style="list-style-type: none"> - A valid (CPL IR) commercial pilot licence instrument rated (at least). - Have completed a recognised flight test pilot course (ETPS, EPNER, Patuxent River, Edwards or equivalent). <p>ii. <u>Flight experience</u></p> <p>FTP must have:</p> <ul style="list-style-type: none"> - At least 10 years of flight experience including at least 5 years of flight test experience. - Accumulated at least 1500 flight hours on the relevant category of aircraft. - Completed a minimum of 50 flight hours & 25 flight test hours per year during the last 3 years. <p>iii. <u>Certification flight test experience</u></p> <ul style="list-style-type: none"> - At least 3 years of certification flight test experience. <p>1.b. <u>Flight Test Engineer (FTE)</u></p> <p>i. <u>Initial qualification</u></p> <p>FTE must have an adequate educational background and level of professional experience:</p> <ul style="list-style-type: none"> - This initial qualification could be obtained by completion of a 	<p><u>NOTA BENE: Interpretative Material for "Comprehensive theoretical and practical instruction..."</u></p> <p>Theoretical and practical on the ground and in flight instruction is considered to be "comprehensive" if it is in line with the following content and performed by an experienced person meeting the other competency requirements as defined in paragraph 2.a:</p> <p>Part 1 Theoretical - detailed theoretical introduction into the basic principles of test flying:</p> <ul style="list-style-type: none"> • Introduction into the concept of: <ul style="list-style-type: none"> - systematic performance evaluation; - systematic handling characteristics evaluation. • Formal preparation of the test: <ul style="list-style-type: none"> - liaison with PCM; - liaison with applicant; - permits to be requested (e.g. PtF); - liaison with tower (ATC); - required weather minima for the test. • Documentation to be requested: <ul style="list-style-type: none"> - flight and maintenance manuals; - description of the modification; - drawings; - test reports. • Flight directive, test plan, selection of

	<p>recognised flight test course (ETPS, EPNER, Patuxent River, Edwards or equivalent).</p> <p>ii. <u>Flight experience</u></p> <p>FTE must have:</p> <ul style="list-style-type: none"> - At least 3 years of flight experience - Accumulated at least 200 flight hours on the relevant category of aircraft. - Completed a minimum of 10 flight test hours per year during the last three years. <p>iii. <u>Certification flight test experience</u></p> <ul style="list-style-type: none"> - At least 3 years of certification flight test experience. <p>*Medical Certificates: The tenderer shall ensure that each flight test pilot / engineer has and maintains, throughout the duration of the contract, a <u>class I / II medical certificate or equivalent</u>. Copies of the medical certificates do not need to be submitted at this stage however <u>please note that</u> the Agency reserves the right to request additional documentation / evidence in support of this requirement in case of doubt.</p>	<p>appropriate airspace area.</p> <ul style="list-style-type: none"> • Safety of flight (e.g. limitations, minimum altitude, evacuation, safety equipment, oxygen). • Standard flight test practices. • Instrumentation of aircraft if needed (e.g. camera, sensors, equipment). • Ground inspection of aircraft: <ul style="list-style-type: none"> - familiarisation with the aircraft; - weight & balance, ballasting or load chart; - consideration of emergencies. <p>Part 2 Practical - detailed practical introduction into the basic principles of test flying:</p> <ul style="list-style-type: none"> • Participation as a trainee in flights on at least five different aircraft (one airship) of the category for which recognition is sought. The flights shall contain exercises of performance and flight handling characteristics. • Preparation of the aircraft for the flight: <ul style="list-style-type: none"> - liaise with ground crew; - pre-flight check of modified aircraft; - pre-flight check of instrumentation if needed (camera, sensors, equipment). • Flight training: <ul style="list-style-type: none"> - demonstration of standard flight test practices; - respecting safety of flight (e.g. minimum altitude, limitations, oxygen, parachutes); - taking notes during flight; - communication with ground crew; - criteria and techniques for abortion of a test point. • Post-flight activities: <ul style="list-style-type: none"> - post-flight check of modified aircraft; - debrief with ground crew; - writing debrief note/report.
	<p>2. <u>CATEGORY 2 – REQUIREMENTS:</u></p> <p><u>2.a. Flight Test Pilot (FTP)</u> - for aeroplanes less than 2000 kg (light airplanes, sailplanes, airships or balloons).</p> <p>The tenderer shall demonstrate that the flight test pilot:</p> <ul style="list-style-type: none"> - Holds the appropriate pilot licence, 	

	<p>ratings and permissions necessary for the relevant operating conditions;</p> <ul style="list-style-type: none"> - Have at least 3 years of flight experience; - Have received a comprehensive (see "Nota Bene - Interpretative Material..." in 'evidence' / right side column) theoretical and practical on the ground and in flight instruction performed by an experienced person meeting the competency requirements as defined in this paragraph (2.a); - Is thoroughly familiar with the principle of the task and is able to follow the flight directive; - Has appropriate experience to evaluate flight performances and flight handling characteristics against airworthiness requirements; and - Is able to report accurately his/her observations. <p>2.b. Flight Test Engineer (FTE) - for aeroplanes less than 2000kg (light airplanes, sailplanes, airships or balloons).</p> <p>The tenderer shall demonstrate that the flight test engineer:</p> <ul style="list-style-type: none"> - Has received a comprehensive (see "Nota Bene - Interpretative Material..." in 'evidence' / right side column) theoretical and practical on the ground and in flight instruction performed by an experienced person meeting the competency requirements as defined in this paragraph (2.b); - Is thoroughly familiar with the principle of the task; - Has appropriate experience to evaluate flight performances and flight handling characteristics against airworthiness requirements; - Is able to report accurately his/her observations; and - Is medically fit for the tasks performed, if his/her tasks include flying. <p>*Medical Certificates: The tenderer shall ensure that each flight test pilot / engineer has and maintains, throughout the duration of the contract, a <u>class I / II medical certificate or equivalent</u>. Copies of the medical certificates do not need to be submitted at this stage however <u>please note that</u> the Agency reserves the right to request additional documentation / evidence in support of this requirement in case of doubt.</p>	
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6.4 Specific Selection Criteria – Organisations Approval & Surveillance

ORGANISATIONS APPROVAL & SURVEILLANCE – SPECIFIC SELECTION CRITERIA		
Specific - Technical and Professional Capacity		
A	Lot 1 & 2 - ECOFA	
	REQUIREMENT	EVIDENCE
A	a. Competence & Experience of the Tenderer	
	<p>The tenderer shall have obtained a minimum of:</p> <ul style="list-style-type: none"> ➤ five years' experience in aviation production organisation oversight in accordance with Part 21, with a minimum of three POA investigations and/or surveillance projects performed for three different production organisations within the last five years, including at least one aircraft manufacturer. ➤ 3 years' experience with ECOFA issues. 	<p>By completing the template provided in Annex XIV_i. ECOFA - Competence & Experience of the Tenderer, the tenderer shall:</p> <ul style="list-style-type: none"> ➤ indicate the number of years it has been performing aviation production organisation oversight activities (at least five years in POA and at least 3 years in ECOFA area); ➤ provide a list and description of the involvement of the tenderer in (at least three) previous projects in the POA investigations and/or surveillance projects field during the last five years, including the dates, location and list of services delivered. <p>Important note for existing contractors: Existing CSPs with valid contracts in the area of Production Organisation Approval (POA), resulting from the 2011 tender procedure (EASA.2011.RP.06), are automatically approved to present expertise to the ECOFA area. Therefore, the evidence for this criterion - 6.4.A.a. Competence & Experience of the Tenderer – does not need to be submitted. Please note however that the evidence requested in criteria 6.4.A.b. & c. below, with relation to the available expertise/personnel, shall need to be submitted as part of your offer and shall be evaluated according to the requirements listed therein.</p>
A	b. Personnel	
	<p>Tenderers must have and be prepared to make available at least two experts fulfilling the requirements listed below in 6.4.A.c.</p>	<p>By completing the template provided in Annex XIV_ii. ECOFA – List of Experts, the tenderer shall indicate the number and the names of experts it shall make available for ECOFA activities.</p>
A	c. Experience, academic/professional qualifications & competencies of proposed personnel	
	<p>The tenderer shall ensure that each of the proposed experts shall have the following cumulative knowledge, experience and qualifications:</p> <ul style="list-style-type: none"> i. education and experience to cover the appropriate aviation knowledge (professional qualifications of the experts) ii. proof of issuance of at least 3 ECOFA or proof by another authorised ECOFA inspector of on the job training on the issuance of at least 3 ECOFA. 	<p>CVs of each expert, according to the template provided in Annex III and Annex XIV_iii. ECOFA – CV Cover Sheet, including, in particular, details of qualification and experience in ECOFA showing:</p> <ul style="list-style-type: none"> ➤ Minimum three years of professional experience in aviation production or maintenance, design or certification organisations, gained either in industry or within an authority ➤ Copy of 3 ECOFA issued by the proposed expert or proof of on the job training of at least 3 ECOFA ➤ Proof of Part-21 POA training such as certificate or equivalent

	<p>iii. ability to verify that an applicant's organisation conforms to its own POA procedures</p> <p>iv. capability to communicate in English on a working level (in written as well as verbally)</p>	<p>➤ Proof of capability to communicate in English</p>
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6.5 Specific Selection Criteria – Flight Standards Approval

FLIGHT STANDARDS APPROVAL - SPECIFIC SELECTION CRITERIA		
Specific - Technical and Professional Capacity		
A	Lot 1: Allocation of Tasks - FSTD	
	REQUIREMENT	EVIDENCE
A	a. Competence & Experience of the Tenderer	
	The tenderer shall have adequate experience and proven competence performing FSTD evaluation activities during the last two years.	The tenderer shall provide a list and description of completed previous FSTD evaluations (including FSTD category, date and location).
A	b. Document management	
	The contractor shall keep and update a programme listing of the evaluated FSTDs under its supervision, specifying when such evaluations were carried out, evaluation reports and all documentation used to support the technical findings together with the corrective action follow-up.	Copy of the relevant FSTD evaluation record-keeping procedures of the tenderer and associated forms to be presented.
A	c. Personnel	
	<p>In order to apply for Lot 1, FSTD evaluation area, the tenderer shall propose at least one Technical Inspector (TI) and one Flight Inspector (FI), fulfilling the requirements listed below in 6.5.A.d, who would be made available for the composition of the evaluation team.</p> <p><i>Please note that the same expert may be used/presented for several areas/roles (TI and FI) (however, for a specific evaluation the flight inspector and the technical inspector shall not be the same person).</i></p>	<p>The tenderer shall:</p> <ol style="list-style-type: none"> Indicate the number, names and roles (TI/FI) of the personnel it shall make available by completing the matrix attached in Annex XV_i. (Lot 1 FSTD) List of Experts. Present the CV of each expert using the template provided in Annex III CV and Annex XV_ii. (Lot 1 FSTD) CV Cover Sheet, including, in particular, details of qualifications and experience described in d. below.
A	d. Experience, academic/professional qualifications & competencies of proposed personnel	
d.1	<p>Each TI and FI expert must have been previously involved in at least six equivalent FSTD recurrent evaluations in at least one of the categories:</p> <ul style="list-style-type: none"> ➤ Full Flight Simulator (FFS) ➤ Flight Training Device (FTD) ➤ Flight Navigation Procedure Trainer (FNPT) ➤ Basic Instrument Training Device (BITD) <p>during the last 36 months.</p> <p>At the stage of allocation a FSTD evaluation of a particular device category (Full Flight Simulator (FFS) or Flight Training Device (FTD) or Flight Navigation Procedure Trainer (FNPT) or Basic Instrument Training Device (BITD)) shall be allocated to a contractor possessing the above requested experience for its TI and FI in the relevant device category.</p>	List and description of the involvement of each expert in previous FSTD evaluations including, category, date and location, meeting the requirement for at least one of the device categories.

d.2	<p>The Technical Inspector shall have at least a level of education which corresponds to a completed university study in aviation engineering or a minimum working experience of ten years in the FSTD related domain or at least:</p> <p>➤ five years working experience in the FSTD related domain and 10 FSTD recurrent evaluations,</p> <p>or</p> <p>➤ three years working experience in the FSTD related domain and 30 recurrent evaluations.</p>	<p>➤ Copy of diploma or substantiated working experience of minimum ten years in the FSTD related domain,</p> <p>or</p> <p>➤ five years working experience in the FSTD related domain and 10 FSTD recurrent evaluations,</p> <p>or</p> <p>➤ three years working experience in the FSTD related domain and 30 recurrent evaluations.</p>
d.3	<p>The Flight Inspector shall be qualified in flight crew training procedures and holds:</p> <p>➤ a valid type rating on the aeroplane/helicopter,</p> <p>or</p> <p>➤ for flight navigation procedures trainer (FNPT) and basic instrument training device (BITD), class rated on the class of aeroplane/type of helicopter) being simulated.</p>	<p>➤ Copy of a valid Type rating or class rating as appropriate,</p> <p>or</p> <p>➤ copy of a valid accreditation card for a Flight inspector issued by a Member State’s Competent Authority.</p>
d.4	Each TI & FI shall be proficient in technical and business English (spoken & written), able to write clear and concise reports in English.	List and description of main involvements in previous projects (with dates, locations references) conducted in an international context during the last three years and demonstrating the delivery of results and recommendations to specialised audiences in English.
d.5	For initial, recurrent and follow-up CMS audits the auditors shall be qualified and have the relevant knowledge, background and experience as appropriate to the activities being audited.	Qualification according to ISO or equivalent.
B	Lot 2: Secondment of Experts – OSD / FSTD	
	<i>*Please note that all experts presented under lot 1 which are subsequently approved and accepted by the Agency through successful contract award shall automatically be valid and approved for secondment (i.e. under lot 2), <u>but not for SET activities</u>, unless otherwise expressly stated by tenderer in the offer. Therefore in case of tenderers wishing to submit an offer for both lots a separate offer does not need to be submitted for lot 2.</i>	
	REQUIREMENT	EVIDENCE
B	a. Personnel	
	<p>For each area, for which the tenderer wishes to apply, at least one expert (fulfilling the requirements listed below in b.) must be made available.</p> <p><i>Please note that the same expert may be used/presented for several areas/roles.</i></p>	The Tenderer shall indicate the number and the names of experts (and the roles for FSTD) it shall make available by completing the matrix attached in Annex XV_iii. (Lot 2 OSD/FSTD) List of Experts.
B	b. Experience, academic/professional qualifications & competencies of proposed personnel	
OSD SET or FSTD		
	The tenderer may propose for participation in	The tenderer shall present the CV of each

	<p>FSTD or OEB/OSD SET, experts to be seconded in the following roles:</p> <ul style="list-style-type: none"> - Technical Inspector (TI) - Flight Inspector (FI) - Chairman (for SET evaluations only) <p>The tenderer shall ensure that all FSTD experts proposed for participation in OEB/OSD shall meet the following requirements:</p>	<p>expert, according to the template provided in Annex III CV and Annex XV_iv. (Lot 2 OSD/FSTD) CV Cover Sheet including in particular details of qualifications and experience showing:</p>
b.1	Each Technical Inspector (TI) and Flight Inspector (FI) expert must have been previously involved in at least six Full Flight Simulator (FFS) evaluations during the last 36 months including at least one initial evaluation.	List and description of the involvement in previous FSTD evaluations including aircraft type, date and location.
b.2	<p>The Technical Inspectors must have at least a level of education which corresponds to a completed university study in aviation engineering or a minimum working experience of ten years in the FSTD field. or at least:</p> <ul style="list-style-type: none"> ➤ five years working experience in the FSTD related domain and 10 FSTD recurrent evaluations, <p>or</p> <ul style="list-style-type: none"> ➤ three years working experience in the FSTD related domain and 30 recurrent evaluations. 	Copy of the diploma or full details of previous experience in the FSTD field (minimum ten years).
b.3	The Flight Inspector must be qualified in flight crew training procedures.	<ul style="list-style-type: none"> ➤ Copy of a valid flight crew licence for Type Rating Instructor or Synthetic Flight Instructor, <p>or</p> <ul style="list-style-type: none"> ➤ copy of a valid accreditation card for a Flight inspector issued by a Member State's Competent Authority.
b.4	Be proficient in technical and business English (spoken & written), able to write clear and concise reports in English.	List and description of main involvements in previous projects (with dates, locations references) conducted in an international context during the last three years and demonstrating the delivery of results and recommendations to specialised audiences in English.
b.5	For initial, recurrent and follow-up CMS audits the auditors shall be qualified and have the relevant knowledge, background and experience as appropriate to the activities being audited.	Qualification according to ISO or equivalent.
For Simulator Evaluation Team (SET) chair only:		
b.6	<p>The Chairman must have working experience as Simulator Evaluation Team (SET) member:</p> <ul style="list-style-type: none"> ➤ involvement in at least three evaluations during the last seven years, <p>or,</p> <ul style="list-style-type: none"> ➤ be previously involved in at least ten Full Flight Simulator (FFS) evaluations during the last seven years, including at least three initial evaluations. 	<ul style="list-style-type: none"> ➤ Evidence of previous experience as SET member, including list and description of the involvement in previous SET evaluations, including category, dates and locations, <p>or,</p> <ul style="list-style-type: none"> ➤ list and description of the involvement in previous FSTD evaluations including aircraft types, dates and locations.

b.7	<p>The Chairman must have previous managerial Experience, i.e.:</p> <ul style="list-style-type: none"> ➤ must have been working on a team managerial position for at least two years. <p>or,</p> <ul style="list-style-type: none"> ➤ must have been involved in at least three projects as a team leader. 	<ul style="list-style-type: none"> ➤ Evidence of experience of minimum two years on team managerial position, <p>or,</p> <ul style="list-style-type: none"> ➤ list of the completed projects (as a team leader), including the subject and the scope.
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7 Award of the Contract

Only the tenderers meeting the requirements of the exclusion and selection criteria will have their tender evaluated in terms of quality and (potentially) price.

7.1 Technical Proposal and Evaluation

Nr	Technical award criteria: The quality of technical offers shall be evaluated in accordance with the award criteria & associated weightings as listed below	Max Points	Technical proposal: The assessment of technical quality will be based on the ability to meet the purpose of the contract as described in the terms of reference. To this end, the technical proposal shall contain the following information to allow evaluation of the tender according to the technical award criteria
1	Comprehension & Methodology/ Rationale & Strategy: <ul style="list-style-type: none"> ➤ Understanding of the terms of reference. ➤ Strategy and approach to the implementation of the contract and execution of the services. ➤ Quality and relevance of the proposed methodology towards duly and successfully meeting the objectives and aims of the contract. 	30	Description of the proposed approach, rationale, strategy and methodology for the implementation of the contract in line with the services defined in the terms of reference and draft contract, including description of inputs and outputs and interactions with EASA processes, standards and personnel.
2	Organisation of work: <ul style="list-style-type: none"> ➤ Availability and involvement of experts (including role of each expert) ➤ Interaction and coordination of tasks (internally and externally, i.e. with the Agency/applicant etc.) ➤ Distribution of the work, in particular amongst any sub-contractors and/or consortium members. 	35	Description of: <ul style="list-style-type: none"> ➤ How the work shall be organised and implemented in particular the distribution of tasks amongst the experts and any sub-contractors and/or consortium members. ➤ The coordination of the work internally and with EASA both for technical and administrative matters. ➤ The lines of communication, coordination with the applicant. ➤ IT tools used in order to receive data from and provide required records to EASA.
3	Quality & Continuity Assurance: <ul style="list-style-type: none"> ➤ Proposed quality assurance/management procedures. ➤ Continuity and reliability assurance. ➤ Availability and ability for dealing with and processing tasks/requests in an effective and efficient manner. 	20	Description of quality assurance/management methodology in line with the requirements defined in the terms of reference and the draft contract (including, without limitation, continuity, reliability, availability, ability, effectiveness, efficiency, response time, customer service, etc.).
4	Management System: <ul style="list-style-type: none"> ➤ Quality of document control & compliance monitoring procedures. 	15	Description or provision of: <ul style="list-style-type: none"> ➤ The document control procedures in place in order to ensure, as described in the terms of reference, the availability, regular updating and distribution of reference documents which serve as the basic working documents throughout the

			<p>organisation.</p> <p>➤ Compliance monitoring, in line with the terms of reference, to monitor the compliance of the management system with all applicable regulation requirements and the adequacy of all procedures with performance objectives. Compliance monitoring shall include a feedback system of audit findings to the senior management to ensure corrective actions are taken as necessary.</p>
	TOTAL	100	

Please note: the information in the technical proposal must be consistent with the terms of reference and such technical proposal must be signed by the tenderer.

7.2 Technical Quality Threshold

Only tenders scoring **75 points or more** (of a maximum of 100 points) against the technical award criteria will have their financial proposal evaluated.

7.3 Financial Evaluation

The financial evaluation will be made on the basis of the price (hourly rate) offered in the model financial offer (**Annex II**) and the following formula:

$$\text{Financial score for tender X} = 100 * (\text{cheapest hourly rate} / \text{hourly rate of tender X})$$

7.4 Financial Proposal

- The financial proposal should be presented in the format provided in **Annex II** and **supported by the information requested therein**.
- Prices must be quoted free of all duties, taxes (such as VAT) and other charges, as EASA is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Communities.
- Costs incurred in preparing and submitting tenders are borne by the tenderer and shall not be reimbursed.

7.5 Choice of the Selected Tender

The contract shall be awarded to those tenderers submitting an admissible tender and meeting the technical threshold as defined in **section 7.2** of the present tender specifications. Once successful accreditation has been achieved the selection of service providers to undertake a particular project will be conducted, as described in **section 2 and Annex XVII** to the present specifications, in accordance with **allocation criteria**. At which point the hourly rate, as provided in the financial proposal, shall be taken into account as defined in the **allocation process**.

ANNEX I - DRAFT CONTRACT

(See separate pdf. Document)

ANNEX II - MODEL FINANCIAL OFFER

Tender Publication Reference: EASA.2013.OP.21

Title of the Contract: Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities - LIMITED RE-OPENING

NAME OF TENDERER:

The financial offer is split into two parts. The first part requires the provision of a standard hourly rate which will form the basis of the financial evaluation of this tender procedure and therefore its provision shall be compulsory for all tenderers. The second part shall not be mandatory and requires the provision of certain flat rates which shall be used during allocation. If the tenderer is able to provide such flat rates the Agency would welcome an offer to that respect.

Part I: Hourly Rate (MANDATORY)

The tenderer is requested to provide an **hourly rate, applicable to both lot 1 & 2**, which shall correspond to **an hour of performed technical work** comprising all related costs (e.g. salary scheme, overhead and administrative costs, etc.) but excluding any costs relating to either travel or subsistence incurred when carrying out assignments away from the PCM/expert's normal place of work. In support of the financial offer, this hourly rate should be **substantiated** by means of a numerical explanation/description of how the hourly rate has been composed – **please note this substantiation is mandatory**⁹.

Reimbursements of travel costs:

*The provisions for the reimbursement of travels costs are described in Annex C to the draft framework service contract (Annex I to these tender specifications). It is important to note, in line with the current fees & charges regulation, that **travel time** within EASA Member States shall not be reimbursed.*

Hourly Rate:

	Price per hour in EURO (without VAT)
Hourly Rate (Lot 1 & 2):	

Note:

- The hourly rate must be quoted in EURO and should include **ALL** expenses necessary for the performance of the contract with the exception of travel costs, which shall be reimbursed in line with the provisions of the draft contract.
- Revisions to this price shall be subject to the provisions of Article I.8 – CHARGES of the draft contract (Annex I to these tender specifications).
- NO additional costs, except those for working time and travel related costs as described above may be charged to the Agency.
- **Existing CSPs –IMPORTANT NOTICE:**
 - In line with section 2.3 existing contractors who have valid contracts with the Agency resulting from the tender procedure EASA.2011.RP.06 **may submit a new financial offer only and exclusively should they wish to reduce their prices.**

⁹**Important:** It is strictly required that such substantiation to the hourly rate be included as part of the financial offer submitted - failure to respect this requirement may constitute a formal error and could result in the rejection of the tender.

- If no new financial offer is submitted, the contractual prices existing in the current contract shall remain valid and apply also to the new areas covered by the present tender.
- If a new financial offer is received from existing CSPs where an increase in the prices is found, such financial offers shall be deemed invalid and the existing contractual prices shall remain valid and apply also to the new areas covered by the present tender.

Part II: Flat Rates (OPTIONAL)

If applicable (i.e. if within the scope for which a tender is submitted) the tenderer is requested to propose 'flat rates' for:

- 1) Certain project categories (in the area of products certification) that are expected to be relatively high in frequency and low in work-volume and,
- 2) For fixed travel times to destinations outside the territories of the EASA Member States.

An offer for such flat rates is to be **expressed as a number of working hours** which will be charged to the Agency at the above hourly rate. The provision of these flat rates is encouraged as they serve not only to simplify the forecasting of related costs but also streamline & simplify the administration of projects/tasks for both parties.

Although the provision and value of the flat rates shall not be strictly evaluated as part of the tender procedure they shall serve as a clear indicator of **relative efficiency & costs** at the **stage of allocation** i.e. for the day to day assignment of tasks in line with the allocation criteria.

Should the tenderer be in a position to offer further flat rates for lot 1, beyond the categories indicated in the table below, information to this respect would be welcomed by the Agency.

It is important to note that it shall be understood by both parties that the offers herewith may subsequently lead to binding agreements, in which case both parties undertake to monitor the agreements and review them on a periodic basis.

Flat rates related to allocated projects:

	Certification Task	Type of Product	Price per unit expressed in: NR OF WORKING HOURS
1	Minor Change/Repair	All CS:	
	Aeroplane Flight Manuals (AFM)	All CS:	
	Flight Conditions (for a Permit to Fly)	All CS:	
	Simple and Standard Major Change/Repair	CS-25:	
		CS-VLA, CS-22, LSA, CS-23:	
		CS-VLR, CS-27, CS-29:	
		Balloons, Airships:	
	Simple and Standard STC	CS-25:	
		CS-VLA, CS-22, LSA, CS-23:	
		CS-VLR, CS-27, CS-29:	
		Balloons, Airships:	
	Description	Region	Price expressed in: HOURS
2	Fixed travel time (return journey) for destinations outside the territories of the EASA Member States	Russia (west):	
		Russia (east):	
		North America (east coast):	
		North America (west coast):	
		South America (north):	
		South America (middle):	
		South America (south):	

		North Africa:	
		Middle Africa:	
		South Africa:	
		Middle East:	
		Australia, New Zealand:	
		Far East:	
	Description	Region	% of hourly rate (Part I)
3	<u>Rebate</u> for travel time (return journey) for destinations outside the territories of the EASA Member States	All	

ANNEX III - CURRICULUM VITAE

EUROPEAN CURRICULUM VITAE FORMAT



PERSONAL INFORMATION

Name [SURNAME, other name(s)]
Address [House number, street name, postcode, city,
country]
Telephone
Fax
E-mail

Nationality

Date of birth [Day, month, year] [optional to complete]

TOTAL YEARS OF [month, year]
EXPERIENCE

WORK EXPERIENCE

- Dates (from – to) [Add separate entries for each relevant post occupied, starting with the most recent.]
- Name and address of employer
- Type of business or sector
- Occupation or position held
- Main activities and responsibilities

EDUCATION AND TRAINING

- Dates (from – to) [Add separate entries for each relevant course you have completed, starting with the most recent.]
- Name and type of organisation providing education and training

- Principal subjects/occupational skills covered
- Title of qualification awarded
- Level in national classification (if appropriate)

PERSONAL SKILLS AND COMPETENCES

Acquired in the course of life and career but not necessarily covered by formal certificates and diplomas.

MOTHER TONGUE

[Specify mother tongue]

OTHER LANGUAGES

[Specify language]

- Reading skills
- Writing skills
- Verbal skills

[Indicate level: excellent, good, basic.]

[Indicate level: excellent, good, basic.]

[Indicate level: excellent, good, basic.]

SOCIAL SKILLS AND COMPETENCES

Living and working with other people, in multicultural environments, in positions where communication is important and situations where teamwork is essential (for example culture and sports), etc.

[Describe these competences and indicate where they were acquired.]

ORGANISATIONAL SKILLS AND COMPETENCES

Coordination and administration of people, projects and budgets; at work, in voluntary work (for example culture and sports) and at home, etc.

[Describe these competences and indicate where they were acquired.]

TECHNICAL SKILLS
AND COMPETENCES
*With computers,
specific kinds of
equipment,
machinery, etc.*

[Describe these competences and indicate where they were acquired.]

ARTISTIC SKILLS
AND COMPETENCES
*Music, writing, design,
etc.*

[Describe these competences and indicate where they were acquired.] [optional to complete]

OTHER SKILLS
AND COMPETENCES
*Competences not
mentioned above.*

[Describe these competences and indicate where they were acquired.]

DRIVING LICENCE(S)

[optional to complete]

**ADDITIONAL
INFORMATION**

[Include here any other information that may be relevant, for example contact persons, references, etc.]

ANNEXES

[LIST any attached annexes.]

ANNEX IV - DECLARATION ON EXCLUSION CRITERIA

To be completed and signed by the tenderer (by each Consortium member, in case of Consortia)

The undersigned:

Name of the individual/company/organisation:

Legal address:

Registration number/ID Card No.:

VAT number:

Declares on oath that the individual/company/organisation mentioned above is not in any of the situations mentioned below:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- c) they have been guilty of grave professional misconduct proven by any means which EASA can justify;
- d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Contracting Authority or those of the country where the contract is to be performed;
- e) they have been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the European Union's financial interests;
- f) following another procurement procedure or grant award procedure financed by the European Union budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

I, the undersigned, understand that contracts may not be awarded if during the procurement procedure the individual/company/organisation mentioned above:

- is subject to a conflict of interest;
- is guilty of misrepresentation in supplying the information required by the Contracting Authority as a condition of participation in the contract procedure or fail to supply this information;

Full name:

Date & Signature:

ANNEX V - LEGAL ENTITY FORM

To be downloaded, depending on the tenderer's nationality and legal form, from the following website:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Choose between the following:

- *Individual*
- *Private Company*
- *Public Entity*

ANNEX VI - FINANCIAL IDENTIFICATION FORM

- In case of consortia, only **one** Financial Identification Form for the whole consortium shall be submitted, nominating the bank account into which payments are to be made under the contract (usually the account of the consortium leader) in the event that the respective tender is successful.
- For those **tenderers who have already performed certification services** on behalf of the Agency and where subsequent payments have been made - If, in the case of successful award and allocation of tasks, payments are to be made to the **same bank account** it **shall not be necessary for these tenderers to provide a new financial identification form**.

Financial identification EN	Ref # [chrono/record num.]
-----------------------------	----------------------------

ACCOUNT NAME (3)

[illegible]

(1) The name or title under which the account has been opened and not the name of the authorized agent

[illegible]

BANK

[illegible]

(2) If the IBAN Code (International Bank account number) is applied in the country where your bank is situated

REMARKS:

--

BANK STAMP + SIGNATURE OF BANK REPRESENTATIVE
(Both obligatory) (3)

DATE:

SIGNATURE OF ACCOUNT HOLDER:
(Obligatory)

(3) It is preferable to attach a copy of recent bank statement. Please note that the bank statement has to provide all the information listed above under 'ACCOUNT NAME' and 'BANK'. In this case, the stamp of the bank and the signature of the bank's representative are not required. The signature of the account-holder is obligatory in all cases.

ANNEX VII - TENDER SUBMISSION FORM

Please choose the appropriate form in line with section 2.3:

- **Annex VII.1: Tender Submission Form – Existing Contractors**
- **Annex VII.2: Tender Submission Form – New Tenderers**

ANNEX VII.1 – TENDER SUBMISSION FORM – EXISTING CONTRACTORS

EASA.2013.OP.21

Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities – LIMITED RE-OPENING

One signed original of this standard application form must be supplied and should serve as the **front page** of your set of **administrative documents** (Envelope 1).

1. SUBMITTED by (i.e. the identity of the tenderer):

Contractor Name	
Outsourcing Contract Ref.	

2. CONTACT PERSON for this tender (to act as focal point for all communication which may take place between EASA and the candidate):

Name	
Organisation	
Address	
Telephone	
Fax	
e-mail	

3. Name and position of the tenderer's AUTHORISED REPRESENTATIVE / SIGNATORY:

Name	
Position	
Organisation	

4. SCOPE OF TENDER – please indicate (by checking the relevant box(s)) the area(s) under which an offer is made:

I PRODUCT CERTIFICATION

Lot 1	PRODUCTS:		TASKS		
			Minor Changes / Repairs	CSV	CAW
	Fixed Wing Aircraft	CS-25	<input type="checkbox"/>		
	Rotorcraft	CS-VLR		<input type="checkbox"/>	<input type="checkbox"/>
		CS-27		<input type="checkbox"/>	<input type="checkbox"/>
		CS-29	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lot 2	PRODUCTS:	DISCIPLINE
	Fixed wing aircraft (CS-VLA, 22, LSA, 23, 25)	1
	Rotorcraft (CS-VLR, 27, 29)	Flights Test
	Balloons & Airships	<input type="checkbox"/>

II ORGANISATIONS APPROVAL & SURVEILLANCE

Lot 1 & Lot 2	ECOFA
	<input type="checkbox"/>

III FLIGHT STANDARDS APPROVAL

Lot 1	FSTD
	<input type="checkbox"/>

Lot 2	FSTD / OSD
	<input type="checkbox"/>

5. CHECKLIST

I, the undersigned, **being the authorised signatory** of the above tenderer (including all consortium members, in the case of a consortium), hereby declare that we have examined and accept without reserve or restriction the entire contents of the tender procedure referred to above. Our tender is made up of the following documents:

ENVELOPE 1 - ADMINISTRATIVE DOCUMENTS:	
✓ Tender submission form (FRONT PAGE) – Annex VII.1.	<input type="checkbox"/>
✓ The duly filled in, signed and dated Statement of Acceptance – Annex IX.	<input type="checkbox"/>
ENVELOPE 2 - TECHNICAL PROPOSAL (submitted in a separate sealed envelope):	
One signed original and CD/USB stick containing an electronic version of the offer (scans of and identical in full to the original offer / documents):	
✓ Specific Selection Criteria - Technical and Professional Capacity Documents (relative to the areas for which an offer is made) as requested in section 6.3, 6.4 & 6.5 and using the checklist provided in Annex XIII, XIV & XV respectively: <ul style="list-style-type: none"> - Section 6.3 - Product Certification – Annex XIII <input type="checkbox"/> - Section 6.4 - ECOFA – Annex XIV <input type="checkbox"/> - Section 6.5 - FSTD – Annex XV <input type="checkbox"/> 	<input type="checkbox"/>
✓ NOT OBLIGATORY: Technical proposal (see section 7.1 of the tender specifications) <ul style="list-style-type: none"> - As detailed in section 2.3 unless the existing contractor wishes to submit an updated / amended technical proposal the technical score achieved under the <u>previous tender procedure</u> shall be applied. 	<input type="checkbox"/>
ENVELOPE 3 - FINANCIAL OFFER (submitted in a separate sealed envelope):	
✓ NOT OBLIGATORY: One signed original and three copies of the financial offer (identical in full to the original) using the template provided in Annex II and including the supporting documentation requested therein. <ul style="list-style-type: none"> - To ensure equal grounds of competition with new tenderers, existing CSPs will be allowed to modify their financial offer <u>only and exclusively if such modification should result in a reduction of the price(s)</u>. In the case no improved financial offer is submitted the <u>prices included in the existing contracts</u> (and evaluated under the previous tender) shall be applied. 	<input type="checkbox"/>

If applicable: We undertake to guarantee the eligibility of the sub-contractor(s) for the parts of the services for which we have stated our intention to sub-contract in the Technical Proposal.]

We are fully aware that, in the case of a consortium, the composition of the consortium **cannot be modified** in the course of the procedure except with the prior written authorisation of EASA. We are also aware that the consortium members would have joint and several liability towards EASA concerning participation in both the above procedure and any contract awarded to us as a result of it.

This tender is subject to acceptance within the validity period stipulated in section 1.7 of the Tender Specifications.

Signed on behalf of the tenderer **by the legally authorised representative**

Name	
Signature	
Date	

ANNEX VII.2 – TENDER SUBMISSION FORM – NEW TENDERERS

EASA.2013.OP.21

Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities – LIMITED RE-OPENING

One signed original of this standard application form must be supplied and should serve as the **front page** of your set of **administrative documents** (Envelope 1).

4. SUBMITTED by (i.e. the identity of the tenderer):

	Name(s) of legal entity or entities submitting this application	Nationality ¹⁰
Leader		
Member 2		
Etc. ¹¹		

5. CONTACT PERSON for this tender (to act as focal point for all communication which may take place between EASA and the candidate):

Name	
Organisation	
Address	
Telephone	
Fax	
e-mail	

6. Name and position of the tenderer's AUTHORISED REPRESENTATIVE / SIGNATORY:

Name	
Position	
Organisation	

¹⁰ Country in which the legal entity is registered.

¹¹ Add/delete additional lines for consortium members as appropriate. **Note that a sub-contractor IS NOT considered to be a consortium member.** If this application is being submitted by an individual legal entity, the name of the legal entity should be entered as "Leader" (and other lines in part 1 should be deleted).

7. SCOPE OF TENDER – please indicate (by checking the relevant box(s)) the area(s) under which an offer is made:

I PRODUCT CERTIFICATION

Lot 1	PRODUCTS:		TASKS		
			Minor Changes / Repairs	CSV	CAW
	Fixed Wing Aircraft	CS-25	<input type="checkbox"/>		
	Rotorcraft	CS-VLR		<input type="checkbox"/>	<input type="checkbox"/>
		CS-27		<input type="checkbox"/>	<input type="checkbox"/>
		CS-29	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lot 2	PRODUCTS:	DISCIPLINE
	Fixed wing aircraft (CS-VLA, 22, LSA, 23, 25)	1
	Rotorcraft (CS-VLR, 27, 29)	Flights Test
	Balloons & Airships	<input type="checkbox"/>

II ORGANISATIONS APPROVAL & SURVEILLANCE

Lot 1 & Lot 2	ECOFA
	<input type="checkbox"/>

III FLIGHT STANDARDS APPROVAL

Lot 1	FSTD
	<input type="checkbox"/>

Lot 2	FSTD / OSD
	<input type="checkbox"/>

5. CHECKLIST

I, the undersigned, **being the authorised signatory** of the above tenderer (including all consortium members, in the case of a consortium), hereby declare that we have examined and accept without reserve or restriction the entire contents of the tender procedure referred to above. Our tender is made up of the following documents:

ENVELOPE 1 - ADMINISTRATIVE DOCUMENTS:	
✓ Tender submission form (FRONT PAGE) – Annex VII.2.	<input type="checkbox"/>
✓ The duly filled in, signed and dated Exclusion Criteria Declaration(s) and documentary proofs, by every legal entity (consortium member/sub-contractor) identified under point 1 of this form, as requested in section 6.1 and using the standard template in Annex IV . (<i>Please note: the declaration of the leader must be a signed original but those of other members may be a copy</i>).	<input type="checkbox"/>
✓ The duly filled in, signed and dated Legal Entity Form(s) as requested in section 6.2.1 and using the standard template via the link in Annex V as well as the requested accompanying documents .	<input type="checkbox"/>
✓ Official documentary evidence proving the tenderer's authorised representative's/signatory's legal authority to validly sign on behalf of the organisation.	<input type="checkbox"/>
✓ The duly filled in, stamped, signed and dated Financial Identification Form (<i>using the standard template</i>) to nominate the bank account into which payments would be made in the event of successful award – Annex VI .	<input type="checkbox"/>
✓ Financial and economic capacity documents as requested in section 6.2.2.	<input type="checkbox"/>
✓ The duly filled in, signed and dated Statement of Absence of Conflict of interest , by every legal entity (consortium member/sub-contractor) identified under point 1 of this form, using the standard template in Annex VIII .	<input type="checkbox"/>
✓ The duly filled in, signed and dated Statement of Acceptance – Annex IX .	<input type="checkbox"/>
✓ In case of sub-contractors , a duly filled in, signed and dated Declaration of Intent using the standard template in Annex X .	<input type="checkbox"/>
✓ In case of consortia , a duly signed and dated Statement/Declaration by each of the consortium members specifying the company or person heading the project and authorised to submit an application/tender on behalf of the consortium (please see section 1.4 of the specifications).	<input type="checkbox"/>
✓ The duly filled in, signed and dated Declaration of Compliance using the standard template in Annex XI .	<input type="checkbox"/>
✓ One signed original and three copies (identical in full to the original) of the General Selection Criteria - Technical and Professional Capacity Documents as requested in section 6.2.3 .	<input type="checkbox"/>
ENVELOPE 2 - TECHNICAL PROPOSAL (submitted in a separate sealed envelope):	
One signed original and CD/USB stick containing an electronic version of the offer (scans of and identical in full to the original offer / documents):	
✓ Specific Selection Criteria - Technical and Professional Capacity Documents (relative to the areas for which an offer is made) as requested in section 6.3, 6.4 & 6.5 and using the checklist provided in Annex XIII, XIV & XV respectively: <ul style="list-style-type: none"> - Section 6.3 - Product Certification – Annex XIII <input type="checkbox"/> - Section 6.4 - ECOFA – Annex XIV <input type="checkbox"/> - Section 6.5 - FSTD – Annex XV <input type="checkbox"/> 	<input type="checkbox"/>

✓ Technical proposal (see section 7.1 of the tender specifications).	<input type="checkbox"/>
ENVELOPE 3 - FINANCIAL OFFER (submitted in a separate sealed envelope):	
✓ One signed original and three copies of the financial offer (identical in full to the original) using the template provided in Annex II .	<input type="checkbox"/>

[If applicable: We undertake to guarantee the eligibility of the sub-contractor(s) for the parts of the services for which we have stated our intention to sub-contract in the Technical Proposal.]

We are fully aware that, in the case of a consortium, the composition of the consortium **cannot be modified** in the course of the procedure except with the prior written authorisation of EASA. We are also aware that the consortium members would have joint and several liability towards EASA concerning participation in both the above procedure and any contract awarded to us as a result of it.

This tender is subject to acceptance within the validity period stipulated in section 1.7 of the Tender Specifications.

Signed on behalf of the tenderer **by the legally authorised representative**

Name	
Signature	
Date	

ANNEX VIII - STATEMENT OF ABSENCE OF CONFLICT OF INTEREST

<Letterhead of the Tenderer>

I, the undersigned, acting as **duly authorised signatory** on behalf of above-mentioned company for the tender procedure **EASA.2013.OP.21 – “Outsourcing of Certification Tasks to National Aviation Authorities and Qualified Entities – LIMITED RE-OPENING”**, hereby solemnly declare that we, our management and all staff involved in the performance of the contract are not and shall not be in any situation which could give rise to a conflict of interest in what concerns the implementation of the contract and, in particular (without limitation) in accordance with the provisions of Annex V to EC Regulation N°216/2008 (in particular item 1¹² thereof). In the event of the contract being awarded to us, we commit ourselves to act with complete impartiality and in good faith in what concerns its performance and outcome.

Date and signature

¹² The entity, its director and the staff responsible for carrying out the checks, may not become involved either directly or as authorised representatives, in the design, manufacture, marketing or maintenance of products, parts, appliances, constituents or systems or in their operations, service provision or use.

ANNEX IX - STATEMENT OF ACCEPTANCE ¹³

<Letterhead of the Tenderer>

[I, the undersigned, acting as **duly authorised signatory** on behalf of [full legal name of the company] [(leading and duly empowered to represent the consortium comprised of [names of partners to the consortium]])] for the tender procedure **EASA.2013.OP.21 "Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities - LIMITED RE-OPENING"**];

[I, the undersigned, with passport number [XXX] issued in [state of issuance] and registered address at [XXX], acting in my own capacity as a private person, in relation to the tender submitted under tender procedure **EASA.2013.OP.21 "Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities - LIMITED RE-OPENING"**];

hereby solemnly declare and confirm [our/my]* unconditional and irrevocable **acceptance of all the terms and conditions** set out in the invitation to tender, in the tender specifications and in the draft contract and, where appropriate, waiver of [the above-mentioned company's/my]* own general or specific terms and conditions. This acceptance shall be fully binding on the tenderer as of submission of the tender and, in case of successful contract award, for the entire duration of the contract.

I am aware that there is no possibility of negotiating the contract and, should the contract be awarded to [us/me]* I hereby undertake to duly sign it with the same terms and conditions and substantially in the form attached to the invitation to tender.

I am also aware and agree that non-acceptance of terms and/or conditions as cited above **may lead to the exclusion of [our/my]* tender** for non-compliance with the tender conditions.

In the event of the contract being awarded to [us/me]*, [we/I]* undertake to submit without delay and certainly by **no later than 15 days following notification of award and prior to the signature of the contract** all the documents requested by the Agency in accordance with the tender specifications, including in particular a consortium agreement (in case of a consortium).

Date and signature

¹³Tenderers are reminded that any failure to later comply with their undertakings under this document or any delay caused by them in signing the contract could trigger **penalties** (Article 109 of Regulation (EU, Euratom) No 966/2012 of 25 October 2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union)

* Delete as appropriate.

ANNEX X – DECLARATION OF INTENT

<Letterhead of the sub-contractor or other entity on whose resources to rely>

I, the undersigned, being the **authorised signatory** for the above-mentioned entity for the procedure **EASA.2013.OP.21 – “Outsourcing of Certification Tasks to National Aviation Authorities and Qualified Entities - LIMITED RE-OPENING”**, hereby solemnly declare and confirm our irrevocable undertaking to collaborate with the tenderer [*insert full legal name of tenderer*] should they win the contract and that all appropriate and necessary resources from our part shall be put at the tenderer’s disposal for the performance of the contract.

Date and signature

ANNEX XI – DECLARATION OF COMPLIANCE

<Letterhead of the Tenderer>

[I, the undersigned, acting as **duly authorised signatory** on behalf of [full legal name of the company] [(leading and duly empowered to represent the consortium comprised of [names of partners to the consortium] [and names of partners to the subcontractors]]]¹⁴ for the tender procedure **EASA.2013.OP.21 – “Outsourcing of Certification Tasks to National Aviation Authorities and Qualified Entities - LIMITED RE-OPENING”**;

hereby solemnly declare and confirm unconditionally and irrevocably that:

- (1) All staff¹⁵ which shall be involved in the performance of contract shall carry out their duties with the greatest possible professional integrity and technical competence and shall be free of any pressure and incentive, in particular of a financial type, which could affect their judgment or the results of their investigations, in particular from persons or groups of persons affected by the results of the certification tasks.
- (2) The impartiality of the investigation staff³ involved in the implementation of the contract shall be ensured and guarantee that its remuneration shall not depend on the number of investigations carried out or on the results of such investigations.
- (3) All staff³ shall observe strict professional secrecy with regard to all information acquired during the execution of tasks under the contract.
- (4) The staff³ responsible for investigation tasks shall have:
 - sound technical and vocational training,
 - satisfactory knowledge of the requirements of the certification tasks they carry out and adequate experience of such processes,
 - the ability required to draw up in English the declarations, records and reports to demonstrate that the investigations have been carried out.
- (5) We employ the necessary staff and possess the means required to perform adequately the technical and administrative tasks linked with the certification process; and shall make available any equipment needed for performance of the contract.
- (6) We have sufficient capacity to ensure high availability and mobility of the staff involved in performance of the contract and shall grant high priority to any mission(s) necessary for the execution and fulfilment of tasks.

Date and signature

¹⁴ Delete as appropriate

¹⁵ Including the staff of all consortium members and subcontractors

ANNEX XII – REQUEST FOR PROCEDURES CD – DECLARATION OF CONFIDENTIALITY – PRODUCT CERTIFICATION

<Letterhead of the Tenderer>

This **declaration** is made by(the undersigned) being **authorised signatory** for[insert full legal name of entity or consortium including all legal entities] (hereinafter "the Tenderer") for the tender **EASA.2013.OP.21 – "Outsourcing of certification tasks to National Aviation Authorities and Qualified Entities - LIMITED RE-OPENING"**,

WHEREAS:

The Agency will disclose certain information that is indispensable for the attainment of the work objectives and is of a confidential nature (hereinafter referred to as "Information") to the Tenderer for the purposes of the above-mentioned public procurement procedure (hereinafter referred to as "**Purpose**").

"**Information**" means any such information (as a whole or any part thereof) which EASA has provided or shall provide to the Tenderer in whatever form including without limitation orally, written, in electronic, tape, disk, physical or visual form, and shall include, without limitation, any and all, policies, programmes, memorandums, decisions, procedures, work instructions, management instructions, process and tasks descriptions, general terms and conditions, statements of compliance, term sheets, user guides, guidance materials, reports, records, rules, plans, templates, forms, checklists, meeting notes, data and all other information whether of a technical, regulatory or business nature or otherwise whether in whole or in part and in whatever form, and on whatever media by which such information is supplied and which is either marked as confidential or proprietary or which is imparted in confidence by the Agency in connection with the Purpose.

In consideration of this disclosure:

1. The Tenderer commits to:
 - 1.1 keep the Information in strict confidence and in safe custody;
 - 1.2 not disclose, use, copy, modify, adapt or record in whole or in part any Information for any reason other than the Purpose and especially to obtain or enable others to obtain any unfair commercial or competitive advantage over EASA or the industry that it represents.;
 - 1.3 not to jeopardise in any way the confidentiality of the Information;
 - 1.4 limit access to Information to those of its employees, agents, directors, professional advisors and/or companies who specifically and necessarily require such Information for the Purpose and to ensure that each such its employees, agents, directors, professional advisors and/or companies observe the obligations set out in this Declaration as if they were parties;
 - 1.5 not directly or indirectly disclose or permit the disclosure of the Information to any other persons;
 - 1.6 not release any press statement or issue any other publicity regarding the relationship between the parties without the prior written consent of the other party; and
 - 1.7 not contact or attempt to contact any third party identified by, or identifiable from, the Information without the prior written consent of the Agency, except where such contact between the Tenderer and the third party was already established for business purposes before the time of disclosure and provided that such contact between the Tenderer and the third party shall at no time (i) be related to the Purpose or the Information or (ii) lead to the disclosure of the Information.
2. The Tenderer acknowledges that the Information remains the sole and exclusive property of the Agency and/or its respective owners and agrees that it shall not acquire any right or title to or licence in respect of the Information communicated by or acquired from the Agency.

Mere possession or any instance of unauthorised disclosure shall not convey any proprietary rights over the Information or parts thereof.

3. This Declaration shall become effective as of the date of its signing.
4. At any time on receipt of a written request from the Agency, the Tenderer shall destroy or return all Information and certify in writing within seven days of the request of the Agency, that all Information in its possession or control has been destroyed.
5. The Tenderer acknowledges that monetary damages may not be a sufficient remedy for damages resulting from the unauthorised disclosure of confidential information and that the Agency shall be entitled, without waiving any other rights or remedies, to seek such injunctive or equitable relief as may be deemed proper by a court of competent jurisdiction.
6. The Tenderer agrees that it shall be responsible for any breach of any of the terms of this Declaration by it or by any other person authorised or empowered by it and the Tenderer will indemnify EASA from and against all loss or damage (including but not limited to legal costs) which may arise from the unauthorised disclosure or use of any of the Information by the Tenderer or by any so authorised/empowered person.
7. A failure or delay in enforcing compliance with any term of this Declaration shall not be a waiver of that or any other term of this Declaration.
8. The rights and remedies provided for in this Declaration are cumulative with and not exclusive of any rights or remedies otherwise provided by law.

Signature:

Name/Title:

Date:

ANNEX XIII – PRODUCT CERTIFICATION

SECTION 6.3: SPECIFIC SELECTION CRITERIA – TECHNICAL & PROFESSIONAL CAPACITY

CHECKLIST

Annex VII	Tender Submission Form - <i>clear indication made as to the areas for which an offer is submitted</i>	<input type="checkbox"/>
Section 6.3.A – Lot 1 Product Certification <i>(if applicable)</i>		
Annex XIII_i.	Competence & Experience of the Tenderer - <i>to be completed by the tenderer for each relevant area - i.e. CS-29/CSV, CS-VLR/CAW etc.</i>	<input type="checkbox"/>
Annex XIII_ii.	Personnel - <i>to be completed by the tenderer / overview of personnel submitted</i>	<input type="checkbox"/>
	Table 1: Please indicate the number of personnel available in each of the relevant area	<input type="checkbox"/>
	Table 2: Please present the personnel which will be made available for the tasks including their function (i.e. PCM, Avionics Expert, Structures Expert etc.), product(s) for which expertise is held (i.e. CS-29, CS-VLR etc.) and number of years aviation & certification experience currently held.	<input type="checkbox"/>
Annex XIII_iii.	PRODUCT CERT - Curriculum Vitae (CV) - <i>to be completed by the tenderer for each PCM/Expert to be made available</i>	<input type="checkbox"/>
Section 6.3.C – Lot 2 Flight Test <i>(if applicable)</i>		
Section 6.3.C.a	Competence & Experience of the Tenderer - all the documents / information requested in section 6.3.C.a included in offer	<input type="checkbox"/>
Annex XIII_iv.	Flight Test Personnel - <i>to be completed by the tenderer / overview of flight test crew submitted</i>	<input type="checkbox"/>
Annex XIII_v.	FLIGHT TEST – CATEGORY 1 - Curriculum Vitae (CV) - <i>to be completed by the tenderer for each flight test crew member (CAT 1 A/C) to be made available</i>	<input type="checkbox"/>
Annex XIII_vi.	FLIGHT TEST – CATEGORY 2 - Curriculum Vitae (CV) - <i>to be completed by the tenderer for each flight test crew member (CAT 2 A/C) to be made available</i>	<input type="checkbox"/>

ANNEX XIV – ORGANISATIONS APPROVAL & SURVEILLANCE :

ECOFA

SECTION 6.4: SPECIFIC SELECTION CRITERIA – TECHNICAL & PROFESSIONAL CAPACITY

CHECKLIST

Annex VII	Tender Submission Form <i>(clear indication made as to the areas for which an offer is submitted)</i>	<input type="checkbox"/>
Annex XIV_i.	ECOFA - COMPETENCE & EXPERIENCE OF THE TENDERER	<input type="checkbox"/>
Annex XIV_ii.	ECOFA - LIST OF EXPERTS	<input type="checkbox"/>
Annex XIV_iii.	ECOFA - CV COVER SHEET	<input type="checkbox"/>
Annex III	Curriculum Vitae (CV) <i>(to be completed by the tenderer for each expert to be made available)</i>	<input type="checkbox"/>

ANNEX XV – FLIGHT STANDARDS APPROVAL:

FSTD

SECTION 6.5: SPECIFIC SELECTION CRITERIA – TECHNICAL & PROFESSIONAL CAPACITY

CHECKLIST

Annex VII	Tender Submission Form <i>(clear indication made as to the areas for which an offer is submitted)</i>	<input type="checkbox"/>
Section 6.5.A – Lot 1 FSTD		
Section 6.5.A.a.	Competence & Experience of the Tenderer - <i>a list and description of completed previous FSTD evaluations (including FSTD category, date and location).</i>	<input type="checkbox"/>
Section 6.5.A.b.	Document management - <i>Copy of the relevant FSTD evaluation record-keeping procedures of the tenderer and associated forms to be presented.</i>	<input type="checkbox"/>
Annex XV_i.	(Lot 1 FSTD) List of Experts	<input type="checkbox"/>
Annex XV_ii.	(Lot 1 FSTD) CV Cover sheet	<input type="checkbox"/>
Annex III	CV – <i>to be completed for each expert to be made available.</i>	<input type="checkbox"/>
Section 6.5.B – Lot 2 OSD / FSTD		
Annex XV_iii.	(Lot 2 OSD / FSTD) List of Experts	<input type="checkbox"/>
Annex XV_iv.	(Lot 2 OSD/ FSTD) CV Cover sheet	<input type="checkbox"/>
Annex III	CV - <i>to be completed for each expert to be made available.</i>	<input type="checkbox"/>

ANNEX XVI - ACCREDITATION OVERVIEW

(See separate pdf. Document)

ANNEX XVII – ALLOCATION PROCESS

(See separate pdf. Document)